



The Value of South Arts as Folk & Traditional Arts Convener

A REPORT FOR SOUTH ARTS

August 20, 2020

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N.B. Other than the recommendations sections written by Mal O'Connor, this report is a co-production of Teresa Hollingsworth, Amy Howard and Mal O'Connor.

Introduction

A year ago, South Arts (SA) finalized the process of developing a new strategic plan. As the arts environment continues to change, SA felt the need to respond to those changes by evaluating where and how the organization has allocated its staffing and financial resources. This evaluation includes a review all of its programming in order to determine which to continue, which to re-define, and which to sunset. The FITS (Folklorists in the South) convening is one of many programs being reviewed.

While reviewing FITS internally, SA evaluated participant feedback, calculated finances required to execute the convening, and took into consideration staff time required to coordinate the convening. The organization concluded that FITS could not continue in the same manner. When considering cost-per-hour, the staff commitment was too intensive to justify the program, in relation to the relatively small number of people impacted by it.

However, instead of opting to eliminate FITS immediately, SA convened a Task Force that would determine what the needs are in the folk and traditional arts field. Why are those needs/gaps not being met, how can they be met (by SA or through some other organization), and would these needs/gaps warrant the continuation of FITS given changes in how the convening is organized and executed.

SA asked the Task Force to share their perspective(s) on the needs/gaps of the field based on their personal experiences, information on previous FITS provided by SA, and the results of the 2019 SA Survey of the Folk and Traditional Arts Community (herein "2019 SA Folk Survey"), and to ultimately prioritize the needs of the field. SA staff will then consider that information and, subsequently, present a recommendation to the SA board of directors.

About FITS

FITS has held its convening 25 times in the past 30 years, occurred mostly in communities—typically rural—throughout SA's nine partner states in which folklorists have worked. During FITS, attendees do not present formal papers; rather, they participate in panels, professional development opportunities, and trips with invited artists to culturally significant areas in the host community. Structurally, FITS has been designed to facilitate informal discussions and networking.

As the convening has evolved, FITS has invited other arts organizations to participate. SA has collaborated with sister regional arts organizations (RAOs)—including Mid-America Arts Alliance and Mid Atlantic Arts Foundation—in organizing previous FITS convenings. Attendance for FITS averages in the 30s. The largest attendance was a joint retreat with Mid-Atlantic Arts Foundation (MAAF); attendance was in the 70s.

This report is an overview of a very rich set of discussions. Many gems did not make it to this final summary. The report includes some excerpts from meeting notes where some of these highlights appeared. A review of these meeting excerpts will be worth your time. There are an amazing number of fascinating ideas and suggestions throughout.

Chronology

In this summary, work is divided into two phases—one before and one following the SA Board meeting in June 2019:

- ▶ **Context for Phase I:** SA Strategic Plan 2019-2023 (approved by the SA Board in July 2018)
- ▶ **Phase I:** Tracks development of the charge to the FITS Task Force, composition of the Task Force, objectives and results of each of the task force's three meetings, and a summary of their findings
- ▶ **Recommendations to the SA Board:** Summarized briefly, along with the charge from the Board to the SA staff that led to Phase II.
- ▶ **Phase II:** Tracks initial preparation for a meeting with a smaller group of folk and traditional arts experts and artists themselves—the arrival of COVID-19, which necessitated adapting the meeting into two Zoom sessions—and a summary of the findings/recommendations made by the group to Susie Surkamer and Teresa Hollingsworth at the second meeting.

SA Strategic Plan 2019

As Mollie Quinlan-Hayes (former SA Deputy Director) described to the FITS Task Force: SA implemented its new strategic plan in July 2018 geared toward SA's mission statement of "advancing Southern vitality through the arts." Of the five goals that the strategic plan outlines, two goals seem specifically pertinent to the FITS Task Force:

- (1) connecting arts and arts professionals in the South to resources that will increase opportunities for success within and outside the region*
- (2) advancing impactful arts-based programs that recognize and address trends and evolving needs of a wide range of communities in the South.*

In addition, the strategic plan has coincided with SA's moving into a space of working outside its region and multi-regionally through collaborations with partners, such as its sister RAOs.

Implementing a new strategic plan was the impetus for SA to review the impact of its current programs. To do so, SA has appointed a Task Force to undergo a review process of the program and then develop a recommendation to the SA Board of Directors.

SA hopes that representatives around the country can help SA address the concerns of its specific sector. Therefore, it is beneficial to develop a task force that includes individuals who are both in-region and out-of-region, familiar and unfamiliar with SA's programming.

Phase I: The FITS Task Force (January - March 2019)

Task:

Develop a set of recommendation to the SA Board of Directors that addresses the following:

1. Determine whether there is a need/void related to convenings in the field of folklife.
2. If it is determined that such a need/void exists, is SA the appropriate organization to serve as a convener?
3. Is there another/more important need/void in the field (that could be an alternative to a convening) that could be filled? And if so, what is the role that SA should consider in addressing it?

Composition:

- ▶ Facilitator: Mal O'Connor
- ▶ SA Staff: Teresa Hollingsworth, Mollie Quinlan-Hayes, Jackson Hall
- ▶ Task Force Members:
 - Amanda Hardeman
 - Amy Kitchener
 - Andrea Graham
 - Beth Hester
 - Cathy Adams
 - Cheryl Castille
 - Chris Cathers
 - Christine Bial
 - Emily Hilliard
 - Jessica Turner
 - Joey Brackner
 - Jon Lohman
 - Kathleen Mundell
 - Langston Wilkins
 - Lesley Williams
 - Maida Owens
 - Malcolm White
 - Stephen Criswell
 - Susan Eleuterio
 - TJ Smith
 - Wayne Martin

Timeline:

- ▶ January 7: FITS Task Force Meeting One
- ▶ January 10 – 18: Survey of the Field Draft
- ▶ January 22: Survey released to the field
- ▶ January 30: Survey closed
- ▶ February 4: Report of survey results posted for discussion at Meeting 2
- ▶ February 6: FITS Task Force Meeting 2
- ▶ March 7 – 8: FITS Task Force Meeting 3

Meeting 1: January 7, 2019

Objectives:

- ▶ Give people the opportunity to meet each other in ways that connect to the primary task.
- ▶ Lay out the primary task and the objectives for all three meetings.
- ▶ Build a shared understanding of the task—informed by the mission, strategy and economics of SA (as outlined in pre-reading materials).
- ▶ Prepare for survey:
 - The survey's questions did not inquire about participants' experiences at FITS or other convenings. Rather, they were designed to address the components of the primary task, asking what voids/needs that participants observe in the field.
 - The survey was sent to professional colleagues, artists, community scholars, and other like-minded organizations and individuals working in cultural heritage.

A few points made about the future of the FITS convening:

- ▶ The less regimented structure provided participants with the space to generate ideas for programming and, through conversations during FITS and afterward, workshop ideas with colleagues from various backgrounds (e.g., non-profits, state arts programs, universities) with much more depth than could be possible in a more structured, presentation-orientated convening like AFS.
- ▶ The structure also facilitates inter-generational learning, with both young and established professionals exchanging experiences and practices.
- ▶ The approach here could be useful in leveraging work it has done in fostering the folklife infrastructure in the South to then assist developing the national infrastructure of the field.
 - The infrastructure of the field is broader than professional public folklorists, and a meaningful convening, structure, or alternative format ought to be inclusive of those who not self-identify as folklorists yet who do work that is resonant with the concerns of the folklife field.
- ▶ The Task Force will consider how FITS (or any other convening) can generate a critical mass of attendance that makes execution worthwhile.

Between Meetings 1 and 2:

- ▶ Task Force members were asked to think through and respond to key questions raised during the meeting.
- ▶ Survey questions were submitted by Task Force members by January 11, 2019.
- ▶ Survey administered and results were analyzed in preparation for Meeting 2.

Meeting 2: February 6, 2019

Objectives:

- ▶ Discuss responses to questions raised at end of first meeting.
- ▶ Discuss survey results.
- ▶ Develop two to five draft recommendation options re: the three parts of the primary task.
- ▶ Agree on a weighting/prioritizing set of criteria to be used by Task Force members between Meetings 2 and 3 to prioritize recommendations.

Survey Findings:

- ▶ There can be great value in convening.
- ▶ The lack of diversity in the field can no longer go unaddressed.
- ▶ We must advocate for ourselves and the field.
- ▶ We can do a much better job of sharing the story of what we do.
- ▶ To have an impact, identifying, recognizing, developing partnerships with organizations doing similar work is necessary.

A few themes from Meeting 2 building on survey results:

- ▶ There is a need to expand the constituency—including organizations, individuals (of varying identities), fields—with whom folklife collaborates and considers colleagues. (The American Folklore Society has expressed a similar desire to expand its membership along those lines.)
- ▶ There is an opportunity to establish new partnerships (cross-sector and cross-discipline) to address the needs of the field.
- ▶ Our advocacy must be germane to the language and perception of the field (i.e., need to make folklife technical language resonant with public audiences and partners, how to craft a perception of folklife that would encourage partners to collaborate on programs, projects, and other endeavors, etc.). The field needs to get out of its own way.
- ▶ Professional development does not need to happen only in person, and we should not assume that SA can or shall provide it—at least not by itself.

Between Meetings 2 and 3:

- ▶ Task Force members were asked to complete weighting/prioritizing of options summarized after Meeting 2.

Meeting 3: March 7 - 8, 2019

Objectives:

- ▶ Share findings from work between meetings and provide an opportunity for any final adjustments and/or additions.
- ▶ Agree on final recommendation—or a couple of options—to submit to the SA Board of Directors at its April meeting.

A few themes from Meeting 3:

- ▶ Regional convenings possess a diversity/inclusion component. Smaller regional convenings can be more accessible—and therefore more inclusive—than national convenings like AFS, bringing in cultural organizations and artists.
- ▶ Convening is most valuable when organizers are clear about ends, purpose, and impact—with convening being a tool to achieve a specific impact for particular purposes. One example used: field building. (Dimensions of field building include shared standards and definitions; infrastructure; training and development; networks. Could “field building” offer a frame for SA and other organizations to use?)
 - NASAA did something similar to this and discovered it opened up opportunities to include voices from a broad and diverse spectrum of fields to engage each other about a specific topic. This has also been a helpful approach for NEA.
- ▶ The data from the survey clearly show the lack of diversity in the field, especially among those who hold degrees in folklore.
- ▶ When we talk about advocating for ourselves and the field—and sharing our story:
 - *Who are we?* Folklife professionals, traditional artists, and people to whom folklorists lobby.
 - *Who are our audiences?* There are two different audiences germane to the issue of verbiage in folklife. There is the structured field consisting of folklorists and folklife organizations. Then there is the unstructured field consisting of organizations that, while involved in cultural heritage, do not share the language of folklife.
 - ▶ It is critical to communicate the value of the field to those outside of it—and by doing this in language they understand and use, we are more likely to open up needed resources.
 - *What are we advocating for?* Resources, public attention, and policy that the insider group needs to do this work?
- ▶ Regarding the identifying, recognizing, and developing of partnerships with organizations doing similar work.
 - There is a great deal of Interest of other organizations and/or sister RAOs to learn/model SA’s traditional arts program.
 - How to share this information/expertise? Three possibilities:

- ▶ Convening of conveners (example: sponsored by NEA, AFS and SA; focus on needs and gaps in the field; how to identify them).
- ▶ Programming and professional development—coupled with policy, advocacy, and diversifying the field (programming components to be shared by multiple organizations).
- ▶ A national summit on the “state of the field.”
 - White paper/report that can be utilized by multiple organizations within and outside the field.
- ▶ There are three levels of possible involvement for SA to lead (in collaboration with partners) identified: convening with local partnerships, convenings rotating between the RAOs, and convening with national partnerships.
- ▶ One interesting question was raised: Is the issue at hand SA’s limitations of resources and staffing? Or is the question: how can FITS evolve into something more? Is the goal to increase the general attendance, or to gather a more deliberate group of constituents periodically for a particular purpose each time?
- ▶ Brackner recommended another AFS forum in which Tom Rankin, Peggy Bulger, and other former SA folklife staff talk about how FITS developed. The result could be a playbook for other regionals, sharing the SA story).

Between Meeting 3 and the Board Meeting:

- ▶ Staff was asked to draft a memo to the SA Board of Directors describing the task, process and final recommendation (or options).
- ▶ This memo was included in the SA Board of Directors materials sent out in advance of April Board meeting.

2019 FITS Task Force Recommendations

A national task force composed of 24 members (composed of academic and public sector, arts administrators, and artists) representing state arts agencies, regional arts organizations, state humanities councils, museums, universities, cultural arts organizations and independent work) was established. The work consisted of two conference calls and the development and launch of a field-wide, online survey between January and March 2019.

A third conference call was held with a smaller, sub-committee of 11 members who finalized the following recommendations based on the previous calls and survey responses.

As the national RAO leader in the field of folklife, SA should continue serving as a convener for the field of folklife, with the following caveats:

- ▶ Future convenings would occur when an issue or topic relevant to the field needs to be addressed.
- ▶ Convenings are dependent upon partnerships (American Folklore Society, state folklore societies, sister RAOs, etc.) with responsibilities shared. Collaboration is essential to create a sustainable model.
- ▶ Convenings would no longer be called "Folklorists in the South." Future gatherings would be re-branded and developed to be more inclusive and larger gatherings.

The Task Force also identified the need for increased, better advocacy to ensure adequate resources and attention for the sustainability of this sector. SA may be one of the multiple leadership organizations working in this area.

The work was led by facilitator Mal O'Connor (of CFAR, Inc., Boston, MA) from January through March 2019.



Memorandum

To: South Arts Board of Directors
From: Mollie Quinlan-Hayes
Date: September 19, 2019
Re: **FITS Future Recommendation**

During its June meeting, the South Arts Board of Directors received a report on the work of the FITS Task Force, chaired by Malcolm White. The Task Force's primary findings are:

- Nationally, there is enthusiasm for South Arts' nationally-recognized (and envied) convening. Future decisions should consider ways of building on the existing reputation.
- There was surprise at the idea of discontinuing the convening, but there was recognition of the need to re-think and re-vamp such a convening to build interest and participation by a broader range of individuals and organizations, which would include changing the name and description of the event.
- Several organizations participating on the Task Force including other Regional Arts Organizations and the American Folklife Center expressed willingness to be an active partner in future convenings.
- Significant time was spent discussing better advocacy to ensure adequate resources and attention for the sustainability of this sector. South Arts may be one of the multiple leadership organizations working in this area.
- Discussion also highlighted the lack of diversity in the field.

Thoughts About Phase I (Mal O'Connor)

The FITS Task Force began with very productive project design work thanks to the leadership of Teresa Hollingsworth, Mollie Quinlan-Hayes, and Susie Surkamer. Design of the project architecture included:

- ▶ Beginning with the end in mind by defining the primary task. This definition helped the Task Force stay on track throughout the project.
- ▶ Determining whom to invite to join the Task Force in order to engage a variety of internal and external stakeholders rather than rounding up the usual suspects. Stakeholders included traditional artists, folklorists and other professionals working with traditional artists, and representatives from other regional and national arts organizations.
- ▶ Laying out a process for engaging stakeholders over the course of three meetings—with the option of holding an in-person retreat if there were major differences in points of view to work through in order to come up with a coherent set of recommendations for SA staff to consider.
 - Each of the three meetings had specific objectives designed to keep the work moving forward.
 - Summaries of meetings helped the Task Force continue to think and test ideas between meetings.
 - A survey drafted in collaboration with Task Force members was sent to a broader, diverse set of stakeholders to test ideas and the Task Force's thinking between its first and second meetings.
- ▶ SA decided to work with an outside consultant to help design and facilitate the project, test assumptions, and help address things like confirmation bias. Working with an outside consultant also gave SA staff members the opportunity to participate in Task Force discussions as well as observe them and redirect discussions as needed.

Lessons Learned:

- ▶ The use of a variety of tools and techniques helped identify and tease out multiple points of view. The tools and techniques included: Task Force discussions, a survey instrument, and video-conference with a smaller group for the final meeting.
- ▶ In future projects like this, it may be useful to conduct all meetings via video conference to better draw out those who may have a lot to offer but feel reluctant to speak during a phone call.
- ▶ It was helpful to have SA Board of Directors representation on the Task Force. They offered clarification on issues when it was helpful and participated as a full member of the Task Force in ways that invited others to bring their voices into the discussion.
- ▶ Making it clear that this was not a "blue sky" exercise was very helpful. Clarity about both the constraints and opportunities outlined in the latest SA strategic plan helped encourage a range of ideas that would work within the parameters of that plan.
- ▶ Members of the Task Force made it clear that SA has a valuable regional and national reputation in the field of folk and traditional arts. Whatever decisions are made by the Board should consider ways of building on that reputation.

Phase II: Overview

Task (taken from Mollie Quinlan Hayes' memo to the SA Board of Directors dated September 19, 2019)

The Board's discussion focused on satisfaction that SA is viewed as a leader in the region and the field, while recognizing the reality of needing to change FITS, given the current environment—from frequency and number of participants to the content and the title of the convening itself. The Board asked that staff develop a game plan, which would include the following considerations:

- ▶ What would trigger the need for a convening/what are likely scenarios in which the convening should take place (a particular opportunity or challenge, a funding or policy issue, etc.)?
- ▶ What would constitute the threshold of participation and partnership to determine a future convening should take place?
- ▶ Should the culture of the field be responsive vs. proactive?
- ▶ Where should we be responsive? Where should we be proactive, in particular to accomplish SA goals?

Staff makes the following recommendations:

- ▶ Convene a small national meeting (in Atlanta, late 2019/early 2020, five people) to discuss what/when/why about a potential future convening.
- ▶ As part of the pre-planning for the meeting, SA should hold conversations with likely partners to get more solid sense of whether they are capable/ready to act if a convening is planned, and what they can commit to contributing. We are adamant that convenings are dependent upon partnerships (American Folklore Society, state folklore societies, sister RAOs, etc.) with responsibilities shared. Collaboration is essential to create a sustainable model.
- ▶ Convenings would no longer be called "Folklorists in the South." Future gatherings would be re-branded and developed to be more inclusive and larger gatherings.
- ▶ At the meeting:
 - Consider the circumstances of a multi-region or national convening that would draw larger, diverse participation.
 - Define what does the field of folklife need to address that is not being answered/considered by other organizations/convenings? Our prompts for this element will include the needs identified by the Task Force.
 - How is the need measured?
 - Consider potential topics that would warrant a convening. Topics would be drawn from national discussions/issues.
 - ▶ Example: DEIA: lack of diversity in the field (regarding the people doing the work, being employed, etc.)
 - We have NEA partnership/folklife funds available to cover the cost of the meeting.

- ▶ Also, we recommend that the forthcoming Creative Placemaking conference (tentatively scheduled at a GA site in fall 2020) include session(s) addressing opportunities/methodology for working with folk and traditional artists and artforms.

Composition:

- ▶ Facilitator: Mal O'Connor
- ▶ Staff Members: Teresa Hollingsworth, Amy Howard, Susie Surkamer
- ▶ Invited Participants:
 - Joey Brackner—Alabama Center for Traditional Culture, AL
 - Christine Bial—Mid-America Arts Alliance, KS
 - Molly Garfinkel—City Lore, New York, NY
 - Junious “House” Brickhouse—Urban Artistry Inc. & Next Level, MD
 - Heather Hodges—Gullah Geechee Cultural Heritage Corridor Commission, SC
 - Kathleen Mundell—Cultural Resources, ME
 - TJ Smith—Foxfire, GA
 - Jessica Turner—American Folklore Society, IN
 - Sally Van de Water—Arts Institute of Middlesex County, NJ
 - Zoe van Buren—North Carolina Arts Council, Raleigh, NC

Timing:

Continuing the 2019 work of the FITS Task Force, a smaller group of ten folklorists (from the public sector, arts administrators and artists) intended to meet in Atlanta for a one-day retreat on March 27, 2020. Everything changed when COVID-19 arrived. To ensure the health and safety of all during the COVID-19 pandemic, a teleconference meeting format was required.

The decision was made to hold two video-conference calls via Zoom instead:

- ▶ Meeting 1: March 27, 2020
- ▶ Meeting 2: May 15, 2020

Meeting 1

Objectives

Use network ideas, including developing partnerships and collaborations with those outside of traditional arts, to think about “convening” in a different way—using “region” as the unit of cultural, geographic, and demographic unit of analysis. (This was built on the importance of networks and partnerships to the 2019 SA strategic plan.)

A few themes from Meeting 1:

- ▶ Recommendations need to align with strategic commitments in the SA 2019 strategic plan:
 - Goal 1: Support the artistic and professional growth and success of artists in the South.
 - Goal 2: Connect artists and arts professionals in the South to resources that will increase opportunities for success within and outside the region.
 - Goal 3: Advance impactful arts-based programs that recognize and address trends and evolving needs of a wide range of communities in the South.
 - Goal 4: Communicate and celebrate the excellence, innovation, value and power of the arts of the South.
 - Goal 5: Secure and deploy/manage sufficient resources to advance Southern vitality and achieve the strategic goals.
- ▶ A number of “guiding principles” to use as a foundation for recommendations were outlined during the discussion. Building on work during Phase I, a SA-led convening needs to:
 - Work with and through partnerships and collaborations in order to produce a much better result than working in isolation. Partnerships and collaborations take time.
 - Use a “region” and/or “sub-region” as a unit of analysis: geographically, demographically, culturally, economically, religiously, etc. However, you slice it: do so intentionally and clearly.
 - Focus on an issue that brings together multiple and diverse groups and organizations that each have a stake in that issue—and show how traditional arts and artists can contribute to addressing that issue. Using a social network approach can help identify those who have a stake in addressing a particular issue.
 - Should not be extractive work, like much of the work in folklore. A convening needs to be a dialogue, one where folklore and folklorists give at least as much as they get—in the service of being of use to the regional communities they work with. Partnerships are built on this kind of mutual reciprocation. (Identify what folklore and folklorists bring to the party that can help create more value for the community.)
 - Focus on goals, not methodology.
 - Take an asset-based approach vs. a lack-based approach.
 - Ensure to the best of our ability that a convening is affordable and low-cost to produce.
 - Include funders: Show the value to them of supporting the convenings—and of taking a community-based focus.

- ▶ Participants discussed models for organizing small, affordable and accessible convenings:
 - There are many models already in use—many are variants of “open-space technology” and some are called “the un-conference model.”
 - Others experimenting with this technology include: the Appalachian Studies Association, Community Anchors (City Lore), NASAA, Creative Placemaking, and others.
 - One idea: Consider convenings that travel from one community/sub-region to another focusing on a particular theme (e.g., surviving and thriving while managing COVID-19, opioid use, etc.)
- ▶ Participants discussed how convenings can create value for communities—building on a guiding principle emphasizing “reciprocity over extraction” by “looking at assets rather than deficiencies:”
 - Show the value of local folk and traditional arts and artists to addressing issues of concern to a community (e.g., how to talk about food, sustainability and other issues).
- ▶ Participants discussed ways in which convenings can create value for folklore/folklorists—as opportunities for:
 - Folklorists to see each other in action—through workshops, etc.—and for skill sharing
 - New partnerships and collaborations—i.e., opportunities for folklorists to reach out and expand their horizons.
 - For adapting how we talk about ourselves and what we do to the languages of other constituencies.
 - Linking funders, policy makers with the folk, folklorists.

(For more detailed notes and ideas on these topics, see the Appendix.)

Between Meeting 1 and Meeting 2:

- ▶ Due to the challenges and disruption to work patterns caused by COVID-19, the second meeting was delayed until May 15, 2020.
- ▶ Participants were asked to think about “triggers” for possible convenings within the context of the SA strategic plan and the “guiding principles” developed at Meeting 1.

Meeting 2

Objectives:

- ▶ Decide in what ways SA should be a convener—and identify triggers for convening. Why should we bring people together?
 - Example: Reinvigorating community after COVID-19. Hardship brings out community. What did you learn the assets were in your community? What did you learn were the strengths of your community? What did you turn to for comfort, for hope, for connection? What grew up in the cracks?
- ▶ Use learnings from the current health crisis to recommend a model for convenings with sub-regional communities.
- ▶ Put together the components of a recommendation that can be taken to the SA Board about how best to structure future convenings.

Questions Discussed:

- ▶ Should folklorists, partners, and stakeholders convene? If so, why?
- ▶ Why should SA act as a convener?
- ▶ What are some possible triggers for such a convening? How do we know when the time is right for a convening?
- ▶ How should we convene? What approach or model should we adopt?
- ▶ Where should we convene?
- ▶ What stakeholders and partners should be included in planning, hosting, and attending the convening?

Conclusions/Recommendations:

- ▶ Should we (members of the field) convene?
 - Meeting participants unanimously concluded that convenings are beneficial and desirable, but that the old model of large discipline-based, hyper-structured meetings, which require yearly long-distance travel, are no longer preferred.
- ▶ Why should we convene?
 - To create value for folklorists through collaborations and sharing—skill-sharing between colleagues, partners, and connections to policy makers and funders, new ways to talk about what we do, etc.
 - To create value for communities—focus on reciprocity instead of extraction, provide new tools, resources, and vocabulary through the field of folklore
 - Convening is mutually beneficial for both partners and stakeholders through collaboration, workshops, discussion, relationship building, connections to funders. and policy makers.
- ▶ Why should SA act as a convener?

- SA existence as a regional organization is ideal for small, regional convenings
 - ▶ Regionals are focused on big picture culture and goals
 - ▶ Unaffected by local biases
 - ▶ Well-established and connected throughout the South
- SA is a leader for folklorists in the field
 - ▶ Experienced folklorist on staff
 - ▶ Ability to connect with field of folklore at large
 - ▶ Programs regularly provide the means for folklorists to connect that wouldn't normally do so
- SA is a national leader and innovator
 - ▶ Proven by response to current health crisis
 - ▶ Reputation allows SA to set a standard and lead the way
 - Ability to respond to new situations and definitions—responding to the traditional arts community and peers
 - ▶ Ability to apply long institutional memory in new ways
- ▶ What are some possible triggers for such a convening?
 - COVID-19
 - ▶ SA should be in the forefront of gathering people together when we can gather again—a need for connection and outreach that SA can fill.
 - ▶ There is a need to acknowledge a new sense of community through hardship, the loss of traditions bearers, revisions to programs and our definition of tradition bearer.
 - ▶ Such a convening will encourage folklorists to work with other sectors to support traditional arts and communities in economic aftermath of pandemic.
 - Environmental disasters—hurricanes, tornadoes, gulf oil spills
 - Issues that affect artists—tourism, public health crisis
 - Address racial equity in the field of folk and traditional arts
 - Displacement—gentrification, climate change/disasters, economic disaster
 - A regional community scholars' program
 - The production of the National Folk Festival in a SA partner state or a theme at the Smithsonian Folklife Festival that is associated with the South
- ▶ How should we convene? What approach or model should we adopt?
 - Affordable and sustainable is the primary goal:
 - ▶ Small, local convenings yearly, with a common theme, hosted by partner organizations with SA as a collaborator
 - ▶ Larger, regional convening every other or every third year, building on takeaways and needs identified at smaller convenings, hosted by SA

- ▶ Incorporation of technology for pre-convening events, live-streaming and recording portions of the convening, and for follow-up
- Content, partners, stakeholders, location, activities determined by a specific geographic, demographic, or a cross-cutting issue theme/trigger.
- In the end, the convening should improve and give back to the community, in addition to allowing for training, collaboration, and conversation within the community.
- Focus on opportunities for hands-on learning and work in the community during the convening, building relationships, increasing support for stakeholders
- ▶ Where should we convene?
 - Locations should be accessible for stakeholders and significant in regard to the trigger and sub-regional focus.
- ▶ What stakeholders and partners should be included in planning, hosting, and attending the convening?
 - New partners:
 - ▶ Non-arts as well as arts-related collaborations
 - ▶ Funders
 - ▶ Community anchors
 - ▶ Local community leaders and policy makers
 - ▶ Other local collaborators with a stake in the theme of the meeting
 - Stakeholders:
 - ▶ Our established partners
 - ▶ People and organizations that have social capital
 - ▶ People who need to be empowered
 - ▶ Tradition bearers
 - ▶ Community groups and leadership

Recommendations

The following recommendations are made from my [Mal O'Connor of CFAR] point of view as an organizational consultant who is also a folklorist. I have been impressed by both the "what" of the SA strategic plan and even more by the "how" of it. Specifically, as a small regional organization, it makes a great deal of sense to focus on ways to gain leverage in order to fulfill the plan—i.e., focus on ways that a network approach favorable to collaboration can make a significant impact with limited resources.

For many years, strategic planning has focused on ways to "differentiate one's organization from competitors" in order to "create value" while making it difficult for others to do so. Recently, a different approach to strategic thinking and planning has made it clear that value can be created by a constellation or network of "players," and the challenge is more one of coordination than of competition. The former approach is based on "scarcity"—the latter on "abundance."

Taking on a collaborative, network approach is most productive when no one organization alone may have the resources (people, tools, capabilities, and money) to address a particular challenge—but in collaboration with others, meeting the challenge is quite doable. Taking that approach requires a different kind of leadership: one that is more systemic in at least two ways.

1. First, through understanding the value each part (organization/stakeholder) plays.
2. Second, through the ability to show each part how it contributes to the success of the system as a whole. I believe SA is poised to take on this kind of leadership role. (See the article sent along with this report.)

SA can take on this kind of leadership and gain the leverage needed to make its desired impact through "convening"—although the current understanding of that term may not be adequate to the task. (More on this below)

You have made it clear that SA should take on the role of "convenor" only if it both supports and *enacts* the SA strategic plan. Included in this report are summaries of each of the meetings, and the recommendations that emerged from them below. They show how and why the Task Forces believe the convening role can be a way for SA to support and enact its strategic plan. Let's begin with the goals of the strategic plan:

- ▶ Goal 1: Support the artistic and professional growth and success of artists in the South.
- ▶ Goal 2: Connect artists and arts professionals in the South to resources that will increase opportunities for success within and outside the region.
- ▶ Goal 3: Advance impactful arts-based programs that recognize and address trends and evolving needs of a wide range of communities in the South.
- ▶ Goal 4: Communicate and celebrate the excellence, innovation, value, and power of the arts of the South.
- ▶ Goal 5: Secure and deploy/manage sufficient resources to advance Southern vitality and achieve the strategic goals.

What could convening mean within the context of the SA strategic plan?

Within the context of the SA strategic plan, it may help to think of convening not only as the design, production and delivery of a meeting, conference, performance—but also as the coordination of multiple stakeholder points of view on a particular issue in which folklife plays a part in highlighting, expressing, exposing, and addressing that issue. As discussed in the recommendations made by the Task Forces, the issue should be one with regional and local significance, e.g., opioid use, tourism or challenges faced by coastal communities.

It helps to step back and widen the aperture to determine where and how SA would best take up its coordinating and convening role. When the aperture expands, convening takes on multiple meanings:

- ▶ To bring together multiple regional stakeholders who share interest in a particular challenge facing the region or a sub-region.
- ▶ To help that network understand how each stakeholder (part of the system) can contribute to addressing the issue in a systemic way.
- ▶ To show how the folk and traditional arts fits and can help “communicate the excellence, innovation, value and power of the arts of the South” in the service of addressing a particular issue.

The shift is a significant one:

From: Convening as bringing together folk artists, folklorists and others interested in the folk and traditional arts for a meeting, conference or performance or a publication. *Folk and traditional arts are the focus of these events.*

To: Convening as taking on the leadership role outlined above in order to address a significant regional or sub-regional issue. The issue, e.g., opioid addiction, COVID-19, or environmental challenges facing the coastal South, serves as a *trigger* for taking on this kind of convening role. *The issue is the focal point. The number and kind of events is dictated by what it takes to address the issue.*

The issue needs to be one in which folk and traditional arts and artists play an important role - as do many other stakeholders (community organizations, economic organizations, chambers of commerce, educational institutions, funders, etc.) Examples of issues that would “trigger” SA’s interest can be found on page 18.

Rather than repeat the findings and recommendations that were made by the group of talented members of the first and second Task Forces, I would like to make a few recommendations that build on that work in order to align “convening” with the strategic plan in ways that put the strategy into action and build on the excellent set of guiding principles developed by the second Task Force group.

These principles can be used as filters to determine whether convening to address a particular issue is worthwhile or not – ways to screen an issue in or out. For the “convening role” to be strategically worthwhile, the issue must be one where SA can:

- ▶ Work with and through partnerships and collaborations in order to produce a much better result than working in isolation. Partnerships and collaborations take time.

- ▶ Take a “region” and/or “sub-region” as a unit of analysis: geographically, demographically, culturally, economically, religiously.
- ▶ Bring multiple and diverse groups and organizations together to achieve sizeable impact.
- ▶ Show how traditional arts and artists can contribute to addressing that issue.
- ▶ Listen and learn as well as teach through a dialogue with communities affected by the issue selected.
- ▶ The focus is on shared goals not a particular methodology. The methodology can be selected to fit the task.
- ▶ Take an asset-based approach vs. a lack-based approach. (Abundance, not scarcity)
- ▶ Ensure to the best of its ability that taking on the convening role is affordable for all stakeholders.
- ▶ Include funders in ways that show the value to them of supporting the convenings—and of taking a community-based focus.

(For more on the guiding principles, see page 15 and the Appendix below)

The “sub-region” approach helps shift the frame

The idea of convening using a “sub-regional” approach was one of the gems that emerged from Task Force discussions. Here is a draft definition:

A sub-region is a web of communities that share a common interest in understanding and addressing a significant issue. There are multiple “types” of sub-regions in the South. A sub region could be geographic (the coastal South). It could be created by a share interest in addressing a public health issue (opioid addiction) or an economic issue (tourism).

For a sub-regional issue to be one where SA considers taking a leadership role, it must be one where folk and traditional arts and artists can make a significant contribution, in collaboration with other stakeholders, to addressing those issues. (Example: Sub-regional type – geographic. Issue selected: climate change challenges facing the coastal South)

The sub-region approach makes it easy to see why South Arts is well positioned to connect folk and traditional arts with communities throughout the region in ways that matter to the people who live in those communities. It’s a way of bringing folk and traditional arts alive, a way of showing their genuine immediacy while having an impact on peoples’ lives.

- ▶ Each sub-regional issue selected would put into action the “guiding principles” listed above and would be designed to enact SA’s strategic commitments.
- ▶ This approach helps “flip the frame” from thinking of a convening as “a single event” that brings individual members of organizations from different communities together in one place—to a convening as something that can be:
 - Focused on issue of significant importance to the sub-region engaged.

- Located in multiple communities by using the same template (sub-regional type and focal issue within that type) co-sponsored by communities, regional and national organizations with a stake in that issue, in places where the convening takes place.
- Conducted over a longer period of time, with local and regional impact as one of the convening’s objectives.
- Shaped through the use of a variety of modalities, some virtual and others face-to-face.

One overarching recommendation: SA should consider doing a variety of things, experimenting and testing as you go to determine their value—rather than putting all its eggs in one basket. These convening experiments could be organized by audience and constituencies served. Here are a few examples that build on Task Force discussions, offered as a way to prime the pump:

For/With other ROAs and folklore organizations:

- ▶ Playbook for how SA takes up its leadership role as a convenor
- ▶ Bi-annual convening of convenors—e.g., RAO’s, NASAA, AFS and others—in collaboration with some of those organizations to continuously develop and strengthen the convenor role.

For/With the region and sub-regions in the South:

- ▶ Over the next two years take an action-learning approach:
 - Select two to three sub-regions of different types (e.g., geographic, public health focused, etc.)
 - Work with arts and other organizations to select a cross-cutting issue to focus on within that sub-regional type. Start small – this approach to convening will take more time – years vs. months.
 - Co-design, co-produce and co-fund “events” that raise awareness and address the issue, including showing ways in which folk and traditional arts can contribute to addressing the issue. (Consider locating work in the communities living with the issue selected vs. bringing stakeholders to one place.)
 - Assess the value of the convening work to the communities served over the next 12-24 months
 - Adapt the convening role based on lessons learned and select the next sub-regions and particular issues to address

How could this work?

- ▶ Think of the first two sub-regional issues selected as ways to build SA’s capability to take on this different kind of convenor role. It will be easier to show how this can fail vs succeed if you bite off more than you can chew.
- ▶ Understanding and addressing each of the two issues could follow similar steps—for example:
 - Take “geography” as a sub-regional type—e.g., challenges facing the coastal South.

- Identify stakeholders from communities along the coast and select a theme for the convening—e.g., the effects of climate change on coastal communities. Drill down to identify a small piece/theme of that issue to address that can be achieved in 12-24 months.
- Identify arts and other organizations with a stake in that particular theme (local, regional, national), and invite some of them to co-host, co-create and co-fund the work. “Convening” is now an umbrella term for coordinating multiple events over time, some face-to-face and others virtual, to understand and address the effects of climate change on coastal communities.
- Co-create a doable plan within a clearly stated timeframe to achieve a desired objective in addressing the theme selected (not the entire issue).
- Build in ways to learn and evaluate what’s working and what’s not as you go vs at the end.

Other examples of sub-regional types that could cut across the entire region:

- ▶ Economic issue sub-regional type/tourism
- ▶ Public health sub-regional type/opioid addiction or living with COVID-19

Thank you for the opportunity to offer a few thoughts and reflections on the work of the FITS Task Forces. The ideas discussed above build on the work of those groups. Where I may have misunderstood their intentions, the errors are mine. All credit for the creative thinking and responses to the questions raised by SA’s leaders and board goes to the Task Forces, and especially to the guidance and leadership provided by Teresa Hollingsworth and her assistant, Amy Howard.

Appendix

From Phase II, Meeting 1: Notes on Each Guiding Principle and Initial Recommendations

Region as Unit of Analysis

- ▶ One lens on regionalism—Take a demographic approach. Most African Americans live in the South. Seven of the states with the highest African American populations are in the South. These are also the poorest states, so financial resources are limited. Demographic issues need to be addressed regionally.
- ▶ Creative placemaking is a great model—being able to include a diverse roster of groups that aren't all art-centric. Region determines what organizations are important to reach different communities/are cultural incubators.
 - In the South there are few organizations that are self-built by immigrant communities. Of these organizations, fewer benefit from association and/or participation with arts councils.
- ▶ Thinking just about artists is limited, too. In Maine, occupational folklife is closely associated with natural resources. Involvement may be problematic, if you include some of those practitioners in traditional culture.
- ▶ Looking at a geographic region sometimes must be smaller than what we think of as a region. Examples: the Blackbelt, Central Appalachia, etc., instead of the entire SA region.

Models for Organizing a Convening

- ▶ Small, affordable, and accessible meetings:
 - There's value in small meetings, too, and much value when groups are small enough to spend real time talking and hashing out ideas vs quick hallway or session conversations. Smaller, regional meetings are critical to sharing ideas in a substantive way.
 - Future convenings might be smaller, focusing on a smaller geographic area than the entire SA region. Example: The Black Belt, Central Appalachia, etc.
 - Create equitable convenings—some gatherings only include those who already have access.
 - Seek methodology to bring people together in an affordable manner.
 - Instead of inviting people to come to a location that could be quite a distance from their community, go to them.
- ▶ Variations of the Unconference Model—or another Open Space design
- ▶ Un-Conference model. Open space. Part of a large conference.
- ▶ Planning organic meetings takes a lot of time and investment—thoughtful planning, personal relationships. Organizational capacity, infrastructure, etc.
- ▶ Example of AFS “Festival of Ideas” at 2019 Baltimore meeting, involved local artists and organizations and was very popular with conference registrants. Unplanned, given to break

out sessions, etc. Developed an organic discussion founded on community goals. Also offered compelling economic development opportunities for local folks.

- ▶ Unconference Model allows for organic growth of discussions, can be shaped within a given topic—again, coming together around a common IDEA or GOAL, not who we are/how we identify.
- ▶ A convening that would be compelling would be like an occupational fair—a place to make connections and help a variety of industries gain a new perspective on how folk and traditional arts could benefit their approach to reaching their goals and address problems that they face with both language, content, and method. Invite people in to “meet folklore.”
- ▶ Ideally, the convening would be designed so there was an opportunity to make sense of everything with a group of people in a similar situation, who are working within the same constraints. New lenses help illuminate new ways of pushing boundaries within organizational culture. A new lens will help people know what the possibilities are, so they know what questions to ask, ways to get around limitations.
- ▶ State Arts agencies don’t have a very progressive culture, so they could benefit from this kind of thing if they aren’t in charge. Talking about constraints and ways to push boundaries and work within them.
- ▶ Field trips are useful and important, especially if participants can self-determine where to go.
- ▶ Other gatherings that a future convening could be modeled after:
 - **The Appalachian Studies Association** is regionally based and attracts people of all disciplines. Being discipline focused is limiting.
 - **Community Anchors program from City Lore** identifies physical spaces where culture communities gather/have ownership. Provides financial investment in resources to support groups cultural activities.
 - The field of folklore has a lot to offer in terms of community examples, projects, and integrating artists into the local culture. **NASAA meeting in Baltimore** was a good model on how to apply that to other fields. Had sessions on economic development, place, health, aging, all kinds of fields. Could we talk to the program organizers of those opportunities?
 - SA is involved in **Creative Placemaking** gathering. The people that attend are mayors, local arts councils, artists, etc. SA plans to develop a strain of workshops dealing with using traditional artists to these kinds of meetings. Susie’s observation is that people aren’t working with traditional artists in their communities.
- ▶ Choosing a theme/issue for a convening + travelling to communities to work on local applications of theme/issue:
 - Instead of saying ‘hey guys, we’re folklorists, come to our folklore meeting.’ Have a common idea and then engage more inclusive participation.
 - Ex. from North Carolina: Use quilting as way to talk about food, sustainability, etc. Warrenton, North Carolina has begun an eco-movement. Understanding the place. Theming grants to tackle problems using the assets that they have.
 - Moving meetings from place to place, service learning. Using a theme, finding ways to identify assets.

- Thinking about a mash-up of fieldwork, education, public programs, and service learning—a convening/community field school—a traveling convening that would go to a different area each year. People from different disciplines, different organizations could all work together on the same project—a project that would leave behind an arts infrastructure or that would strengthen existing resources.
- A consulting convening. One that cooperates with local community leaders and members to provide the training/project implementation that they would like to see done. Could be surrounding a theme (climate change and traditional arts, for example) or assets/needs the community identifies.
- ▶ Looking at assets, not problems or deficiencies:
 - Maine discovery research program example—40 counties, trained local people to do cultural inventory work. Two-fold purpose—collection and community organizing. They never talked about lack of resources but identified their assets.
 - Asset-based models push people in a positive direction. It deemphasizes the need for money. Don't have to build big arts center. Maine program built a community arts structure. People came to forums because they thought it was interesting and because someone from the community invited them.

How Convenings Can Create Value for Communities

- ▶ Reciprocity vs extraction
 - Importance of leaving something behind and not extracting. Reciprocity needs to be a core value. What is the goal and what can we leave behind?
 - AFS works with local community, brings local people to national meetings. Working WITH communities, working FOR communities. Changing the mindset to be COLLABORATIVE, not extractive. This takes partnerships and trust.
 - And, too often work (by folklorists, museum folks) is extractive—not being reciprocal, taking and not giving back. That gives communities an allergy to the work and to contributing. Repatriation is a problem. Partnerships depend on trust.
 - Be mindful of communities that are apprehensive of our field. Partnerships. Working with communities and not extracting.
- ▶ The value of folk and traditional arts and artists to addressing an important issue in a region/community:
 - Identifying what we as folklorists have that we can give:
 - ▶ Folklore relieves social tensions through shared experience
 - ▶ Folklore dispels misconceptions
 - ▶ You can spot the language we use in other fields. We have a shared language with others even if it's not the same words. Look to see who is using that language. Other people are thinking about these things but may not have the language for them.

- ▶ The field of folklore has a lot to offer in terms of community examples, projects, and integrating artists into the local culture.
 - Example: Zoe van Buren is working with a new entity at Duke University. They were trying to engage more with the state. New arts center had dance studios and a radio station and was trying to be an arts space for Durham and not just Duke. They were able to secure the space for a gathering of emerging traditional artists, connected with graduate students and hosted an exhibit on millennial culture. The president of Duke took notice. Folklife gave the university a community and grassroots connection. Folklife had not been on their radar. Future collaborations will be easier because of the success of relationship building and benefit to all participants.

How Convenings Can Create Value for Folklore/Folklorists

- ▶ Opportunities for folklorists to see each other in action—through workshops, etc.—and for skill sharing
 - The benefit of seeing colleagues in action. Convenings that include workshops or community training elements are an opportunity to do skill swapping. Everyone would be receiving additional training. Learn from one another.
 - Having action take place to train and cooperate.
- ▶ New partnerships and collaborations—i.e. opportunities for folklorists to reach out and expand their horizons
 - By building relationships, we help maximize the reach and impact of our discipline.
 - Because the South has such limited resources, there are people that have their feet in multiple areas. Example: Folklife festival and work force services. It will help us reach this goal if we identify those people.
 - NCAC/Duke story is an example of projects that forged partnerships of mutual benefit. How people with folklore training work in other areas to open doors?
 - Example: Historical Arts Commission work in three counties in northeastern Florida. They invited a wide range of folks to contribute. State goals, wondering who is doing the work across those goals. Important to include resource people, people doing the work, and people supporting the work. Also: having people who might be coming from a different perspective but who recognize cultural markers. For example: a folklorist doing fieldwork might not recognize specific markers of Gullah/Geechee culture and therefore think there isn't G/G culture in a given area, but a G/G fieldworker or community scholar would.
 - Always include indigenous communities.
 - Work on developing new networks with immigrant communities who are changing the face of regions.
 - Consider other agencies—health, human services, faith-based, work force—to connect.

- We have broadened networking ideas and what a convening would be. How do we connect better to different organizations and different people? How do we use other terminology that others use so they feel that they have ownership in this process?
- ▶ Shifting how we talk about ourselves and what we do:
 - Understand the frustration of “the f [folk] word.” The importance of code-switching. (Sometimes we use it, but only w/ other folklorists)—focus more on goals/results/outcomes than the “folk” methodology. Example—in building the Birthplace of Country Music Museum, the focus was on building community, emphasized the end goals—not what they were doing was folklife work (in fact other board members didn’t realize that former director Jessica Turner identified her work as “folk”).
 - Eliminating the need to define ourselves. Recognize (all sorts of) people as experts.
 - The words that we use are really important! Think about the words that we pick to describe what we do. Emphasizing the goals that the meeting is supposed to accomplish instead of the methodology. People who are doing the work.
- ▶ Opportunity to link funders, policy makers with the folk, folklorists
 - In the NCAC’s case it’s difficult to fund tradition bearers that don’t fit the traditional “arts” mold.
 - All meetings should bring in an opportunity for funders to be in the room.
 - ▶ cultural groups, political groups, funders
 - Bring funders to future convenings so their representatives have a better understanding of geographic and cultural communities. Examples: Ford Foundation, Crossroads Foundation
 - AFS is moving beyond membership to outreach. How to diversify the culture of folklorists. Moving toward a national online initiative discussion of what is folklore to people. Looking at new immigrant groups within the states and regions within which we are working. These groups often don’t have resources. We need to bring funders into the room as much as possible. Funders don’t necessarily have staffers interacting with the people/groups they are funding.