

LOCAL LEARNING

Connecting folklorists, artists, and educators
since 1993



2023 Strategic Plan

This document was prepared in Spring 2023 and the plan it contains was officially adopted by Local Learning's Board of Directors on May 23, 2023.

Local Learning Board 2022-2023

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Local Learning Staff

Paddy Bowman is Founding Director of Local Learning and co-edits the *Journal of Folklore and Education*.

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Cover images clockwise from center left:

- Students in Binghamton, NY worked with Italian Mosaic artist Luigi Gobo and Teacher partner Cristine Crossgrove to complete a mosaic through Culture, Community, and the Classroom, a Local Learning program
- Local Learning partners from Teaching with Primary Sources project and Fire in Little Africa at the American Folklore Society meeting. Photo by Mary Wesley of Vermont Folklife.
- Image from *Folk Arts in the Classroom*. This document was the report from the National Roundtable on Folk Arts in the Classroom that launched Local Learning in 1993.
- Artist and tradition bearer Sue Knox in conversation with workshop participant. Photo by Lee Speary, courtesy of the ARTS Council of the Southern Finger Lakes.
- *Monument to Our Resilience* (24'x15'x16'), 2020, by Ofelia Esparza, Rosanna Esparza Ahrens, assisted by Denise Esparza, Xavier Esparza, Grand Park Civic Center, Los Angeles, CA. Featured in the 2023 *Journal of Folklore and Education*
- Paddy Bowman, Founding Director of Local Learning facilitates a Culture, Community, and the Classroom workshop.



mosaic mural by Hector Duarte at Chicago's Western Pink Line L Stop

For thirty years, Local Learning has brought a cultural lens to complex subjects, celebrating the rigor and wisdom of traditional knowledge while connecting educators, artists, folklorists, and learners in a variety of transformational ways.

In the last five years, Local Learning has seen incredible growth: its operating budget and number of programs both tripled, the open access *Journal of Folklore and Education* is permanently housed on its own website with an active Editorial Board, and additional staff helped navigate these changes.

In 2023, thanks to the compelling stewardship and thoughtful strategy of its staff and board, this organization is fiscally strong and ready to encounter the challenges of an increasingly fraught and polarized educational landscape.

Making a Plan: Local Learning's Strategic Process

The secure footing on which Local Learning stands allowed the 2023 Strategic Planning process that shaped this document to be dedicated to questions of how the organization can best thrive. Consultant Jess Hutchinson was brought on to help guide the process. She and Executive Director Lisa Rathje then created a brief survey that was sent to Local Learning's email list. The survey received 46 total responses; Jess then held seven 30-minute follow-up interviews with respondents who both volunteered to share more about their experiences and responded to an invitation to schedule an interview time.

The survey revealed that practitioners working in and proximate to folklore in education are often multi-hyphenates with feet in several worlds, and many are often the only or one of only a handful of folks focused on folklife in their working environment. Local Learning and its work help practitioners know they're not alone. **Local Learning is deeply valued, has earned a great deal of trust, and is a leader in the vital work to create a more diverse and inclusive society.**

Local Learning provides tools that enable constituents to advocate for the value of their work and community arts and culture writ large – and an overwhelming 95% of respondents are hungry for even deeper engagement. Responses also revealed opportunities for growth in visibility and awareness of the organization.

Across all roles and regions, respondents find Local Learning’s current resources valuable – while not every resource is applicable for each practitioner’s needs, no resource was ranked “Not Useful” in this survey. Increasing knowledge of available tools and resources may be one area for growth in Local Learning’s visibility and accessibility. *The Journal of Folklore and Education* (JFE) is an especially beloved and much-valued resource.

Across survey responses and follow-up conversations, there were constant reminders of how important the *local* part of this work is to practitioners. Folks are not looking for plug-and-play, one-size-fits-all templates; rather, they seem to be most hungry for deeply thoughtful, adaptable resources that help them engage the expertise of their local artists and tradition bearers. They want to do work that is customizable, but they still want to maintain connection to what’s happening across the larger field. Many believe that Local Learning is exceptionally well-placed to serve as connector and best practice thought-partner.

With this feedback from stakeholders in mind, board members and staff used their January 2023 Chicago retreat to surface what matters most to this organization and articulate how those values guide the work Local Learning does with and on behalf of its constituents nationwide.



Images from the
January 2023 Strategic
Planning Retreat

The results of this careful inquiry are found in the following pages, which are designed to guide Local Learning’s next five years of evolution. Rather than a map where X marks the destination and step-by-step directions spell out how to get there, this document will act as a compass, guiding the organization toward its vision in a way that allows for continued responsiveness to the unexpected challenges and opportunities the coming years will no doubt include.

This plan is also a tool with which Local Learning can keep itself accountable by examining each decision through the lenses of these newly articulated values, vision, and strategic directions.

In the field of folk arts, we don’t bring the arts to the people, we highlight the arts from the people; we believe the arts should be of and by as well as for the people.

— Dan Sheehy, National Roundtable on Folk Arts in the Classroom

Invoking a Metaphor: A Balanced Whole Composed of Three Parts

Metaphors prove powerful as kernel images and ideas that evoke deeper associations and meaning – like the rich context of many folk and traditional art forms. During the Strategic Planning Retreat, the board came to identify a multi-pronged focus that relies on each element to support the whole of Local Learning's mission. The image of a three-legged stool emerged as a salient platform for understanding and building our thinking.

The three ideas informing the supports of the stool included:

- Supporting and connecting a **Network** of folklorists, artists, and educators invested in surfacing and honoring community-based cultural expertise
- Providing **Professional Development** programs that share and demonstrate Local Learning models with diverse audiences of educators, artists, and folklorists as part of its inquiry-based educational practices
- Centering **Evaluation and Research** offering tangible evidence that the models and methodologies that center cultural arts and knowledge are creating transformational educational experiences with and for learners of all ages



Residency in Puerto Rican music conducted by Los Pleneros de la 21, at IS 218, Washington Heights, New York City. Photo by Hazel Hankin, City Lore.

Image from *Folk Arts in the Classroom*. This document was the report from the National Roundtable on Folk Arts in the Classroom that launched Local Learning in 1993.

LOCAL LEARNING

Mission (why we exist)

Local Learning connects folklorists, artists, and educators across the nation and advocates for transformative learning through the inclusion of folklife and traditional arts in education for the purpose of creating intercultural understanding and building stronger communities.

Values (how we serve)

We are people-centered and process-driven.

- To be **people-centered** means that respect, connections, partnership, equity, and inclusion inform all our relationships and collaborations.
- To be **process-driven** means that we work iteratively, with purposeful reciprocity and reflexivity built into our programs.

Vision (where we are headed)

Local Learning envisions a nation of lifelong learners who understand traditional arts and knowledge as critical tools for transformative solutions to the complex challenges of today's world.

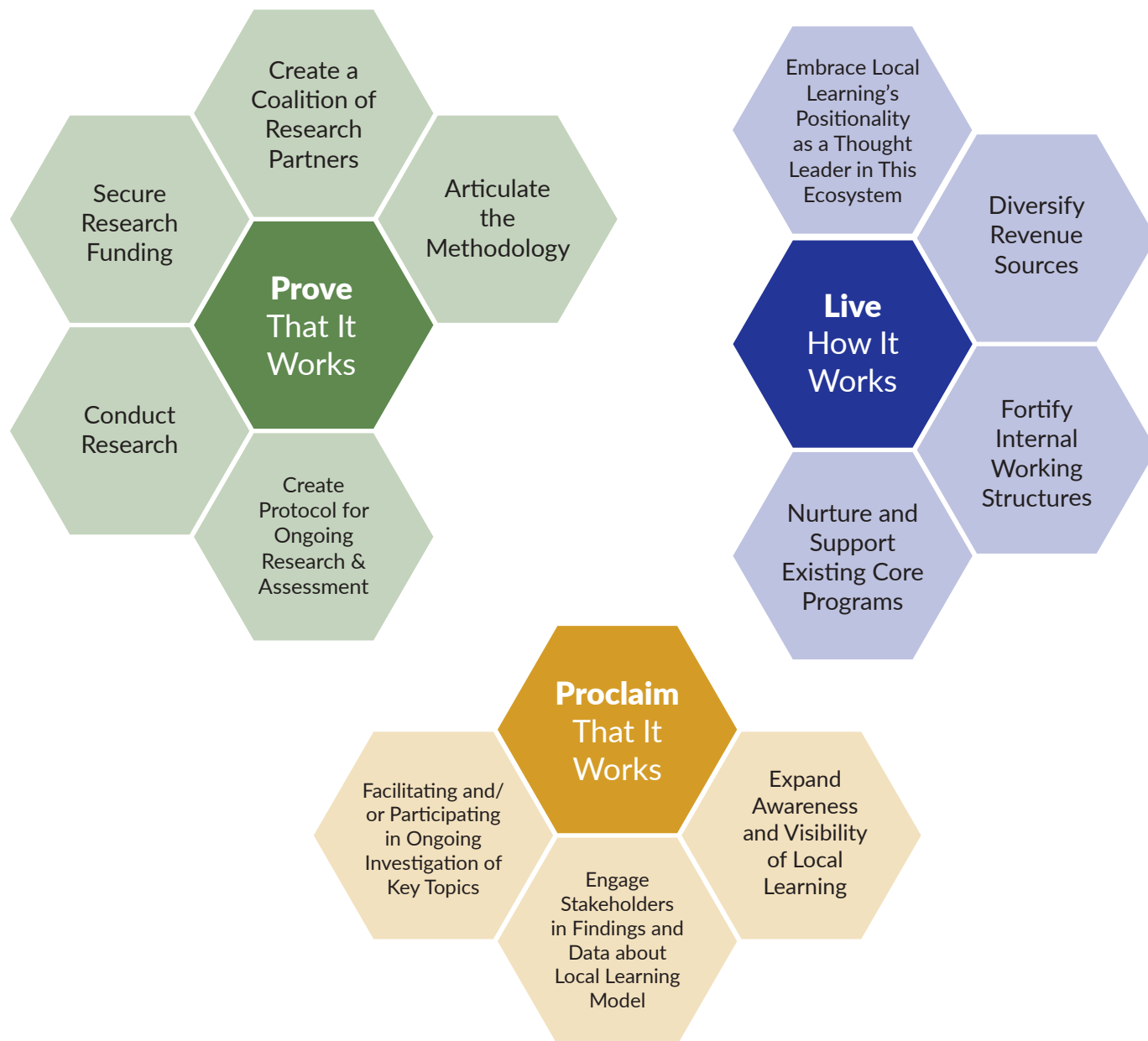
To build a more equitable and inclusive world, learners of all ages must purposefully develop the skills embedded in folklife methods to explore local knowledge, thereby recognizing one another's humanity while learning more about themselves and their communities.



With this Mission, Values, and Vision as key compass points, Local Learning will focus our efforts in three **Strategic Directions**, each of which center on our model of inquiry-based ethnographic process, and are outlined next.

LOCAL LEARNING 2023 Plan on a Page

In its first 30 years, Local Learning has developed a model of inquiry-based ethnographic process that triangulates the expertise of educators, folklorists, and artists to create improved learner engagement and understanding of themselves and others. This strategic plan is grounded in a recognition of that model, dedication to its further codification, and the expansion of its principles of centering people and process. That model is the “it” to which these three strategic directions refer.



Strategic Direction 1:

Prove That It Works

Creating Evidence that Demonstrates the Efficacy and Impact of Local Learning Model

WHY

There is strong anecdotal and qualitative evidence for the efficacy of Local Learning's model of inquiry-based ethnographic process that triangulates the expertise of educators, folklorists, and artists to create improved student engagement and understanding of themselves and others. Yet folklife education lacks multiple studies and rigorous research-derived evidence that supports the felt and witnessed experience. Local Learning will use this new effort to document evidence to inform future planning and programs, and strengthen our cases for support and collaboration with funders, partners, and participants.

HOW

Articulate the Methodology

What we'll do:

- Continue program delivery to our established high standard and use this ongoing work to help specify the articulation of methodology
- Create a publicly available document that outlines the inquiry-based ethnographic approaches to surfacing, documenting, valuing, and applying knowledge that lives within a given community
- Engage and train collaborative teams that triangulate educators, folklorists, and artists

We'll measure our success by asking:

- Do our programs continue to meet or exceed goals established by staff in collaboration with the board?
- Is there a publicly available document that clearly articulates what the organization means when it says Local Learning Methodologies?
- Does this document communicate the methodologies in a way that is compelling and clear to varied stakeholders, especially funders, potential research partners, peers, and colleagues in both education and folklore fields, and other partners?
 - Does the documentation provide boilerplate text that can be used repeatedly for funding proposals, grant applications, etc.?

Create a Coalition of Research Partners

What we'll do:

- Identify and recruit academic researchers
 - Develop a study based on the qualitative data found in JFE, other resources and materials offered through the Local Learning website, and collected ethnographically from past participants and partners
 - Research via a contemporaneous study of an active program
- Identify and recruit academic institution(s) supporting researchers
- Identify and recruit teacher and school partners willing and able to host research studies

Create a Coalition of Research Partners (continued)

We'll measure our success by asking:

- Have we identified and agreed to collaborate with partner researchers for the literature review and/or interview study?
- Have we identified and agreed to collaborate with partner researchers for the contemporaneous study?
- Do those researchers have academic home institutions supporting their/Local Learning's work?
- Have we identified and agreed to collaborate with teacher(s) and school(s) willing to host our research?

Secure Research Funding

What we'll do:

- Either through activated academic partnerships or research-funding grants, we will secure funding to cover the studies we intend to undertake

We'll measure our success by asking:

- Do we have the financial resources required to support the completion of at least one study of the key Local Learning Methodology?



Artist and tradition bearer Sue Knox (right) in conversation with workshop participant.
Photo by Lee Speary, courtesy of the ARTS Council of the Southern Finger Lakes.

Conduct Research

What we'll do:

- Work with academic partners, researchers, teachers, and schools to design, implement, and report on evidence of the key Local Learning Methodology's efficacy and impact

We'll measure our success by asking:

- Did the research studies happen?
- Were they completed in ways consistent with Local Learning's dedication to rigor?
- Are reports of findings complete?
- Are reports of findings published and available? (online? Open-source? In journals? books?)

Create Protocol for Ongoing Research & Assessment

What we'll do:

- Use the findings from the initial research study to create continuous quality improvement protocols that allow for the ongoing investigation, documentation, and improvement of Local Learning Methodologies

We'll measure our success by asking:

- Have the research findings explicitly informed or changed the way we do our work? How?
- For every program we offer, are we collecting useful data that helps determine and monitor our impact?
- Are we using that data to improve programs? How?



Children participate in an Ikebana (flower arranging) workshop led by HistoryMiami Museum 2012 artist-in-residence Mieko Kubota, a Japanese master Ikebana artist, during Family Fun Day.
Photo courtesy HistoryMiami Museum and featured in the 2020 *Journal of Folklore and Education*

Strategic Direction 2:

Live How It Works

Become a Model Citizen of a Healthy and Thriving Learning Ecosystem

WHY

We are compelled to work in spaces where cultural plurality is not only allowed but also celebrated. As pressures on our educator, artist, and folklorist partners from increasingly restrictive local, state, and national forces mount, Local Learning will be a model and a beacon of a social justice-oriented, inclusive, and expansive education-focused institution. This modeling includes ensuring that our internal business practices are equitable, anti-racist, and supportive of the health and well-being of the organization, staff, board, partners, and communities.

HOW

Embrace Local Learning's Positionality as a Thought Leader in This Ecosystem

What we'll do:

- Act as a megaphone for the work of our Network of folklorists, artists, and educators
- Actively seek regional and national opportunities for convening, collaborating in thought-partnerships, resource sharing
- Cultivate and use access to regional and national thought leaders to infuse our methodologies and folklife-driven ethos into sites where education and larger cultural and/or community-based conversations take place

We'll measure our success by asking:

- Have our staff and board embraced Local Learning's identity as a thought leader in these conversations? Have examples of this leadership in action been documented and/or shared with constituencies?
- How many conversations with other thought leaders has Local Learning representation participated in? How many were they instrumental in advocating for?
- How are these conversations being recorded and built upon? Do we have a clear and sustainable communication-tracking system facilitating communications?
- How have these conversations contributed to the shared creation and cultivation of a healthy, thriving, culturally pluralistic ecosystem? What actions and alliances have emerged or are emerging?

Nurture and Support Existing Core Programs

What we'll do:

- Recognize that Local Learning has developed vital programs like Culture, Community, and the Classroom (CCC) and Teaching with Folk Sources, a curriculum and training project funded through the Teaching with Primary Sources program of the Library of Congress - and that these programs require care and attention to continue to thrive
- Employ *Journal of Folklore and Education* (JFE) as a resource and an opportunity for our Network to share research, case studies, and classroom connections.
- Nurture relationships with existing Network partners and other advocates
- Continue to thoughtfully explore piloting the expansion of CCC beyond New York State

We'll measure our success by asking:

- Are CCC and Teaching with Folk Sources appropriately resourced?
- Does JFE's reputation and visibility in our field continue to grow (i.e., are more people proposing pieces of writing, are more readers visiting the site, etc.)?
- How frequently and how deep are collaborative conversations with current Network partners, program participants, and prospective collaborators?
- Is there a system in place to track conversations with those constituencies?
- Is there a strategic means for evaluating where expansion and new pilots of core programs are feasible and desirable?



Local Learning partners from Teaching with Primary Sources project and Fire in Little Africa at the American Folklore Society meeting. Photo by Mary Wesley of Vermont Folklife.

Fortify Internal Working Structures

What we'll do:

- Articulate and continually examine each aspect of Local Learning's work through an anti-racist social justice lens
- Ensure staff members are being compensated with field-leading salary, benefits, and human-centered company work policies that are transparently available to all staff members
- Design staff and board job descriptions
- Establish performance review processes for staff and board that are reciprocal and generative
- Evaluate and monitor staff capacity and make sure that staff is "right-sized" for the work undertaken by the organization
- Use a strategy-based approach to evaluate opportunities and partnerships presented to the organization

We'll measure our success by asking:

- Can we articulate what we mean by "anti-racist, social justice lens" for the organization? What are concrete ways in which that focus manifests in operations?
- Are staff being fairly compensated based on an annual analysis of other similarly sized nonprofit organizations?
 - And then: are staff being compensated competitively?
- Are staff policies clear, responsive, and human-centered?
- Have we created performance review policies that are reciprocal and generative?
- Do staff and board have access to and understanding of their roles and responsibilities?
 - This may look like new job descriptions, new board book and descriptions, additional processes for onboarding staff and board, etc.
- Are performance reviews for staff and board scheduled and taking place in accordance with policies that create a reciprocal and generative process?
- Are there enough people on staff relative to the number of projects and amount of work being undertaken?
 - How is the workload assessed?
- Is Local Learning exclusively pursuing projects and partnerships that align with the organization's vision, values, and strategic directions?



Paddy Bowman, Founding Director of Local Learning facilitates a Culture, Community, and the Classroom workshop.

Diversify Revenue Sources

What we'll do:

- Articulate and document a compelling case for organizational support
- Analyze where there are opportunities for additional funding streams that are aligned with and support Local Learning's overall visions, values, mission, and strategic directions
- Examine and reallocate staff capacity and time specifically to the pursuit of new forms of revenue in support of the mission and vision

We'll measure our success by asking:

- Is there a clearly written, easily accessible "elevator pitch" that describes what Local Learning does, why, and how it matters for use when pursuing different funding opportunities?
- Is Local Learning applying for more grants?
- Is Local Learning receiving more grants?
- Is Local Learning in conversation with new, different, or more granting entities?
- Has fee-for-service work increased or deepened?
- Are there other new and aligned sources of income being explored?
- Do funding sources reflect and align with core values?

Strategic Direction 3:

Proclaim That It Works

Convey Local Learning's Impact & Value Within and Beyond Our Field

WHY

Local Learning's work is beloved, trusted, and has created transformative experiences for learners. This strategic direction ensures that not only is Local Learning continuing to do the work, but that it is increasing the organization's visibility in and beyond the education, arts education, research, community-building, and social justice sphere AND folklife in education's importance and impact.

HOW

Expand Awareness and Visibility of Local Learning

What we'll do:

- Create succinct talking points for board, staff, and partners that share the essence of Local Learning and its work
- Create collateral and messaging documents that can be shared with educators, folklorists, and artists with key features of how Local Learning can support and supplement their work
- Use these talking points in conversations with potential partners in academia/research, funding, national ecosystem conversations to ground and reiterate positionality and impact
- Add articles explicitly in each issue of JFE that highlight Local Learning's work
- Maintain connectivity with program participants and people who use Local Learning resources to track impact
- Increase educators' awareness of folklife in education and the cultural expertise available in their community as accessible tools for them and their students

We'll measure our success by asking:

- Have key analytics on the Local Learning and JFE websites shown an increase in traffic?
- Have we seen an increase in inquiries, requests for information or partnership?
- Do staff and board members feel more confident initiating or contributing to conversations on behalf of Local Learning, offering the organization as a model for colleagues and others in the field?
- Has the narrative-creating process for grant writing and other funding requests become easier or more streamlined due to talking points and boilerplate creation?
- Does each JFE issue include at least one article specifically related to Local Learning's work?
- Are more teachers who have interacted with Local Learning programs integrating local cultural expertise/folklife into their lesson plans?

Engage Stakeholders in Findings and Data about Local Learning Model

What we'll do:

- Create a communication plan that shares findings with partners, the field, and relevant press
- Create a longitudinal communications plan and strategy that helps to keep this work in the consciousness of educators, partners, folklorists, etc. as new data become available

We'll measure our success by asking:

- Is there evidence of curiosity and excitement about our research findings seen among our partners and Network?
- How many press outlets pick up the story of research results?
- Have inquiries around interviews, conversations, or partnership increased?
- How else does sharing this data open avenues for new collaboration or scaling of extant programs?
- Is there a sustainable, current record-keeping system that tracks all of the above?

Facilitating and Participating in Ongoing Investigation of Key Topics

What we'll do:

- Initial research findings are just the beginning. Local Learning will use the data collected to spark new and deeper questions about Local Learning's and field-wide efficacy of integrating traditional knowledge into sites of learning
- Local Learning will attain and dedicate resources specifically to this ongoing, rigorous process of inquiry into methods of inquiry










We'll measure our success by asking:

- Is Local Learning engaged in ongoing dialogue with research and field-wide partners?
- Are the results of inquiry sparking new and deeper questions for investigation?

Explore How It Works Strategy Fortune Teller

Paper fortune tellers are part of a folk tradition of divination, similar to bibliomancy or reading tarot. This one takes the key strategic directions of Local Learning's plan and makes it easy for you to explore and apply them to your own work or projects. Use this tool the next time you're feeling stuck and see what wisdom in yourself you can unlock.

1. Cut out the square below and fold diagonally corner to corner both ways to find center
2. Turn the paper text-side down
3. Fold the corners into the center so the big word boxes are together
4. Flip the whole thing over and fold the corners to the center again
5. Fold the fortune teller in half in each direction to make creases
6. Put your thumbs and pointer fingers in the flaps to make a 3-D diamond shape
7. Choose one of the four options, then spell out the word(s) by opening and closing the teller in opposite directions once for each letter
8. Choose a number and repeat the opening/closing that many times
9. Choose a Strategic Task that resonates and open the flap to read your prompt

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|  | <p>Fortify Structures 9</p>  <p>Have you created the kind of structure you need to contain and support your work?</p> | <p>Expand Awareness 7</p>  <p>Who else knows about your project or work? Are there other people you should tell?</p> | <p>PROCLAIM</p> |
| <p>Nurture & Support 5</p>  <p>When's the last time you had a glass of water? Or a good snack?</p> | <p>How might you make that structure even stronger or more supportive?</p> | <p>Sometimes help comes from surprising places!</p> | <p>8 Continue Investigation</p>  <p>Did you move into doing before you were ready?</p> |
| <p>Thought Leadership 4</p>  <p>Is your project based on a new idea?</p> | <p>Your work needs nurturing - but so do you!</p> | <p>Try going back into investigation mode and engage your curiosity to help get unstuck!</p> | <p>Articulate Your Method 1</p>  <p>Have you spelled out for yourself what you're trying to do and the way you want to do it?</p> |
| <p>PROVE</p> | <p>Research! 3</p>  <p>Where have you turned for research, history, and guidance?</p> | <p>2 Create a Coalition</p>  <p>If you want to go fast, go alone - but you might want to go far!</p> | <p>LIVE</p> |