

LEADING MUSEUMS TODAY

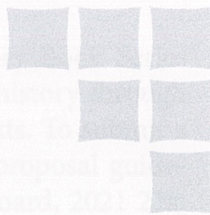
THEORY AND PRACTICE

MARTHA MORRIS



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The American Association for State and Local History (AASLH) addresses issues critical to the field of state and local history through interpretive, intellectual, scholarly and educational texts. To propose or manuscript for the series, please contact the publisher, AASLH, 2021 1st Ave. South, Suite 320, Nashville, TN 37212. Telephone: (615) 330-3203. Website: www.aaslh.org.



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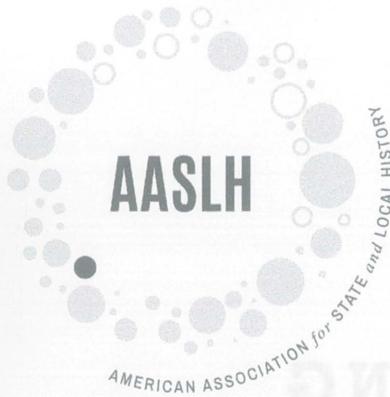
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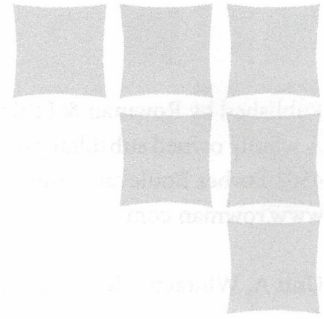
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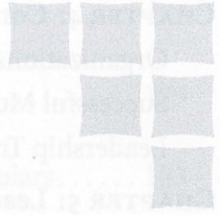
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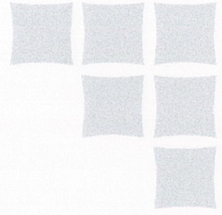
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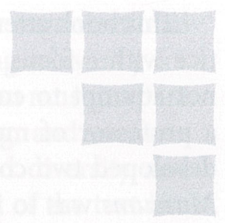


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- Opportunity
- Courage

These three words are a quarter of what I have tried to do with my career. Passion for what matters—the collections, the mission, and the people of the museum. Opportunity—knowing when to seize it and recognizing the people who helped me succeed. And Courage—to build on the opportunities, take risks, and hopefully achieve success. I believe these are traits of all successful leaders.



PREFACE

Back at the dawn of the information age, I attended a black tie gala event at the National Building Museum in Washington, DC. This was during the day when *Computerworld* collaborated with the Smithsonian on an annual awards program for leaders in the technology field. The dinners were always over the top. At each table there would be clever toys for the guests to play with and test their creativity. One year it was building blocks . . . where we could build anything from a log cabin to a new museum! The neat thing about the blocks was that they had words engraved on them. As the evening concluded I decided to pick up a few of these blocks. The words I chose were

- Passion
- Opportunity
- Courage

These three words are a mirror of what I have tried to do with my career. *Passion* for what matters—the collections, the mission, and the people of the museum. *Opportunity*—knowing when to seize it and recognizing the people who helped me succeed. And *Courage*—to build on the opportunities, take risks, and hopefully achieve success. I believe these are traits of all successful leaders.

This book attempts to look at modern leadership theory and practice with a focus on museums. The topic is vast and this book does not attempt to cover every major leadership theory or example. As a professor of museum studies at George Washington University I developed two courses on this topic. The goal of *Leading Change in Museums* was to introduce students to for-profit and nonprofit literature and examples that provided lessons for the museum field. The class also featured case studies of leadership in museums and guest lectures by practitioners who shared their stories of change. The second course *Leading Museums in Turbulent Times* was taught on line. Here the students and I explored the reality of the many challenges and best practices in the field and how they could be prepared for their own leadership journey.

I hope this book will serve not only students but those who care deeply about museums with particular resonance to museum board members, CEOs and senior staff, consultants, volunteers, and those individuals looking to improve their leadership skills at any level. The book will also appeal to library and archives professionals, to nonprofit management students, as well as those seeking business or law degrees but with a focus on the arts and museums.

This book explores in some detail the leadership literature in for-profit and nonprofit organizations, managing change internally and externally, individual leadership traits, and approaches at many levels of the organization, current innovations in museums, and preparing the next generation. Chapters cover the context for museum leadership today including the challenges of the sector. A focus on the best practices of organizations helps to lay the groundwork for ensuing chapters on successful leaders. The chapter on organizational change covers life cycles, problems inherent in managing change, and examples of how museums are facing and coping with change.

The text further details literature on leading in contemporary society with examples of individuals who are proven models in both for profit and nonprofit settings. As leadership occurs not just at the top but at many levels, a detailed review of making change from the middle and succeeding through team-based approaches reflects this important part of the leadership continuum. Dramatic changes are occurring in all sectors of society, and museums must adopt innovative approaches involving planning, internal structure, and the interface

with the external world. A chapter is devoted to new organizational designs, decision systems, and key values for assuring relevancy for museums. Today's leaders as well as the next generation must prepare through self-awareness, formal and informal training, and mentorships. The mandate for gender equality, fair pay, and diversity and inclusion are addressed as well. A substantial portion of the text is a set of nine case studies written by leaders of varied museum types and locations. Each outlines the innovative practices at their museum and several address their approach to professional development.

Throughout the text I address both business management theory and museum practice. Interviews with a variety of leaders highlight the passion and courage and thoughtful approaches of museum leaders today. To stimulate further critical thinking, each chapter includes a set of discussion questions, and the appendixes include helpful advice on learning styles and hypothetical exercises for solving common leadership challenges. A selected bibliography provides ideas for further exploration on this important topic.

Many of the people in the museum field have made an impact on my thinking about this text. Gail Anderson, Robert R. James, Beth Tuttle and Anne Bergeron, Anne Ackerson and Joan Baldwin, Elaine Neumann Gurian, Gail and Barry Lord, and Marsha Semmel have all written and lectured eloquently on this topic.

Many fine examples of best practices illustrated in the book come from practitioners in the field, including Jamie O. Bosket, Michelle Delaney, Laura Huerta-Migax, Marilee Jennings, Jillian Jones, Elizabeth Kirby, Erin Mast, Jessica Nault, Elizabeth Pierce, Jack Rasmussen, April Salomon, Lauren Sheffield, Sandra Smith, Lauren Telchin-Katz, and Allison Titman. Others who have contributed their ideas and experiences to my research and teaching include Harold Closter, Karen Dale, Judy Gradwohl, Julie Johnson, Nick Munn, Maureen Robinson, Kathy Dwyer Southern, Greg Stevens, and John Wetenhall. Because many of the lessons of this book reflect my teaching practice at UW Museum Studies I want to also acknowledge the support of Professor Kym Rice in encouraging me not only to pursue my courses, but in particular our mid-career leadership seminar, and of course, the writing of this text. I also owe my gratitude to Spencer Crew who as director of the National Museum of American History, gave me the

practice leadership as his deputy in the 1990s. That transformative
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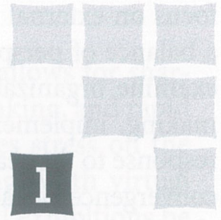
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Martha Morris



INTRODUCTION

This is not a book just about leadership. This is a book about public service. Leadership is a phenomenon of every sector of our lives from family to workplace to business and government. We are therefore a society obsessed with defining, criticizing, and seeking the best in leadership. There is a significant body of literature over the last century that addresses the characteristics of success for individual and organizational leadership. This literature has evolved in response to society's needs. In what are surely turbulent times, a day doesn't go by that we don't think about how to solve critical problems, how to sustain our organizations, and how to be a significant contributor to our community. Behind the fundamental obligations of preservation and stewardship of collections, museums now have responsibilities with significantly higher stakes. We have committed ourselves to contributing to the quality-of-life in our society. And we do not do this alone. We must work alongside other nonprofits, arts and cultural organizations, individual scholars and artists, and with for-profit and government bodies. Our best leaders believe in public service and citizenship, in making a difference, and upholding our values.

This book is about the context, the urgency, and the nuances of service to the mission of the museum organization whether at the level of the governing body or a middle manager. The book will therefore study the concept of followership as a necessary part of effective leadership. A

focus on external and internal operations of the museum will provide a balance of perspectives. Addressing internal concerns, the book will examine organizational design, new modes of planning and decision making, implementation of strategic programs, and flexibility in the response to the reality of constant change. Externally we will look at the convergence of factors that influence success including demographic changes, political trends, globalization, and sustainability among others.

The book will highlight the leadership philosophy and literature that resonates with the challenges we face in the early twenty-first century. The voices and stories of individuals in the museum field are a featured part of this text. The importance of advocacy, persistence, creativity, and empathy will be emphasized. We need to begin by examining the challenges of museums, their staff and stakeholders.

The Leadership Challenge

Museums today face incredible challenges as well as new opportunities. Globalization, new technologies, competition, demographic change, collections preservation, accountability, financial turmoil, environmental sustainability, and staffing changes are all major concerns. We are hard at work redefining the nature of community expectations, reevaluating the composition of our boards and staff, and determining the best approaches to collections care and access. These issues are explained in more detail below.

Demographics

The aging of our workforce and population, the growth of the millennial generation, and the growing recognition of our diversity including race, gender, and ethnicity along with a growing economic divide have continued to create a complex set of challenges. This is particularly critical in the museum field as we struggle with the concept of Inclusion. These shifts also impact the visitor population and audience expectations of our museums. The reality of competition from numerous options for our leisure time or educational pursuits means that a museum visit (virtual or physical) may be less appealing to our changing populations. We compete with theaters, YouTube, amusement parks, vineyards, universities, and retail enterprise.

Technology

Growing dependence on technology in every sector allows for sharing of information and services, improved decision making, and rapid operational improvements. At the same time it places stress on the worker and leader, as the pace of change is daunting. With virtual reality will we need bricks and mortar museums? Will exhibitions be designed and built by machines? We know that younger generations are sometimes bored by museums and seek experiences that are interactive and technology-based. If we can buy everything on line and have it delivered to our door, do we need to travel to a museum? In the world of social media, will Instagram and Facebook allow for citizen curators or educators? At the same time online fundraising and marketing is increasing the number of individuals reached through the activities of crowdsourcing and crowd funding. Technology allows us to conduct business through teleconferencing, webcasts, or Skype; and, in fact, you can do your job anywhere at any time. But, this may or may not be a positive factor in making good decisions or building collaborative teams.

Globalization

Fewer trade barriers, new sources of investment, and labor in a flat world lead to a new competitive environment. Asia and the Middle East are importing our talent in building their cultural infrastructure. Their building boom leads to new competition in the art markets, the museum labor force, and pressures for possible repatriation or loan of collections to their original homelands. Along with globalization is the reality of national security in a post-9/11 world. How do we safeguard collections, facilities, staff, and visitors? Worldwide threats to cultural heritage create a new challenge for our museums already stretched thin.

Environmental Sustainability

The worldwide call for sustainability has been embraced by museums. A green imperative is evident in Leadership in Energy and Environmental Design (LEED) requirements in building construction. Museums embrace this new ethic through more flexible climate control

standards, through solar power and geothermal air systems, low flow toilets, and intensive recycling. Not only do museums need to protect the environment in their operations, but they must also now provide new levels of awareness and education about these issues to their audiences. And in some cases museums will need to take the moral high ground by rejecting the financial support of corporations that spoil the environment.

Economy, Recession, and Political Sentiment

Shrinking resources have been with us for a long time, requiring ways of working smarter. Recessions are a regular and cyclical phenomenon yet museums seem to consistently get hammered by them. Too many times do we see headlines about museum layoffs, closures, or mergers. What do our government and other funders really want from the non-profit or arts sector? Foundation support for museums is often predicated on a particular policy initiative such as community relevance. Individual donors seek projects that match their interests, but may also want to have a level of control over the outcome. Federal money has been set aside for partnerships between museums and libraries and in support of underserved communities such as tribal museums. But frequently we see pushback to shrink the federal support for arts and humanities.

The social and economic context of modern museums has spawned new efforts for change. We now see growth of grassroots advocates representative of varying communities. Museums seek economic sustainability through new business models. These may take the form of increasing revenue producing activities or corporate sponsorships. Possibly even moving into the business of consulting through providing expertise for a fee to other museums worldwide. Internally, we redefine our work processes to reengineer core processes to streamline and speed up work; or we simply outsource the work to contractors. Museums look to the for-profit sector to adopt approaches that will assure sustainability. As we move in these new directions the public reacts by demanding accountability and transparency. Are we true to our mission?

In responding to these challenges we need to face the reality of leadership failure. In cases where we are not prepared to deal with new

demands we can stumble. A factor that increases this reality is that nonprofits and museums are led by volunteers. Board members are legally responsible for managing their organizations, but often are not experienced in running them effectively. We unfortunately see mismanagement and failure in our sector as a result.

Evolving demographic shifts require succession planning for retiring leaders and other key staff. Twenty-first century learning skills are the foundation of the new workforce: critical thinking, collaboration, creativity, and innovation are needed to assure museums' ability to remain sustainable and provide needed service to society.

Expansionism

The challenges of museums today involve many risks including those related to ambitious programs meant to improve the museum's reputation, attract audiences and new sources of funding. In the past two decades we have seen a building boom that has resulted in spectacular new buildings or renovated spaces in support of improved collections care, exhibitions, community events, and retail activities. As noted in the writings of Richard Florida, cities are now seeking to attract a "creative class." These artists, teachers, writers, and performers among others seek each other out and in turn create an environment that attracts new business and populations, including tourists.¹ In 2016 the *Art Newspaper* reported that this building boom represents an investment of close to five billion dollars.² The results are increasing audiences and operating costs, along with donor fatigue and staff burnout. Similar findings were reported in the landmark 2012 study *Set in Stone* by the University of Chicago's Cultural Policy Center.³ That study of new art museums and performing arts centers in the US revealed that projects span close to a decade of work and frequently run over budget. A glaring example is the February 2017 resignation of the Director of New York's Metropolitan Museum of Art after implementing a costly expansion program and other new areas of growth.⁴

The museum field is certainly in turmoil over these radical changes and resulting problems. Robert Janes writing in his landmark text *Museums in a Troubled World* expressed a deep concern about the survival of museums. He feels that we are not in touch with the expectations of society and in many ways have become irrelevant. We need

to focus our role in a civil society and transform or renew ourselves into what he calls the “mindful museum.”⁵

The problems Janes sees are numerous. In particular museums appear to be too concerned with a marketplace mentality and adoption of business practices. This focuses energies away from public service. A myopic mind-set allows museums to avoid needed change. The most glaring example is an emphasis on money over mission. Corporatism can be defined as adopting a corporate mentality, focused on activities that provide income.⁶ This leads to a loss of independence or to a blurring of the lines between for-profit and nonprofit. This plays out in activities such as lending for-profit, deaccessioning to support operations, highly paid CEOs, and corporate underwriting and implied endorsements. Are these acceptable practices? Loss of independence will evoke public scrutiny, tighter regulations, and straying from the mission.

Unhappy Staff

Individuals working in museums are highly motivated to support the mission of the museum and safeguard professional practices despite being paid relatively low wages. The risks are high. In a turbulent world staff are often demoralized by the decisions of leaders. They are concerned about lack of voice in planning and the well-being of their collections, creative programming, and colleagues. In 2017 staff at Plimoth Plantation in Massachusetts formed a union to combat low pay, unsafe working conditions, and burnout.⁷

The constant pace of change will be examined in chapter 3, but we are reminded of a countless number of challenges in the form the American Alliance of Museums’ (AAM) *Trendswatch* reports.⁸ Provided through the expert research of the Center for the Future of Museums, we can examine any number of trends that impact our field. Some that are critical to leadership in a modern world include

- Issues of social justice
- Climate change and long-term sustainability
- Changing nature of the labor market
- Changing nature of organizational design
- Response to technological changes

- Challenges to nonprofit tax status
- Empathy
- Agile design

Workforce Issues

How do we deal with the many new trends and the challenges of museum work in the twenty-first century? Staff are aging and lacking in the diversity that reflects our communities. Additionally, a modern world requires a more flexible and humane approach to managing people. A study conducted by the Arts Alliance of Great Britain called for a more diverse and flexible workforce, creation of new approaches to learning and training, and a new emphasis on expanded skill sets including business, leadership, and all things digital. Aside from these new workforce skills, the study recognized the need for creating organizations that are more flexible, agile, and entrepreneurial.⁹ Further studies point to similar concerns for our workforce. A joint survey by the American Association for State and Local History (AASLH) and other historical associations revealed that public historians entering the field need to be “adaptable, creative, and resourceful. Concerns about decreasing public support, competition for funding, and skepticism about the value of history among some demographic groups suggest that the current generation will need to demonstrate the relevance of history and secure resources.”¹⁰

Clearly professional standards and ethical mandates continue to evolve. Museums need highly trained staff, committed governance, and innovative leaders to assure their long-term success.

What Do Museum Leaders Need to Succeed?

In surveys conducted by the author in 2012 museum leaders and staff highlighted the importance of the following skills to effectively do their jobs or lead their organizations:¹¹

- Communications
- Project management
- Interpersonal skills
- Managing change

- Fundraising
- Finance and budget
- Time management

The survey further defined that in the future museum professionals will need to be prepared to be excellent strategic planners, technology gurus, marketing geniuses, and superb collaborators with a host of partners. Although these skills will be tough to obtain, we need to be prepared. The boards seeking new executive leadership have high expectations. In reviewing recent recruitment announcements for top positions in museums we find the following desired skills, many of which are similar to those above.

- Vision and expertise in leadership and management
- Work with multiple and diverse internal and external constituencies
- Passion for and commitment to community service
- Exceptional communications skills
- Financial savvy and proven fundraising skill

On a day-to-day basis the museum professional is required to handle communications, networking, leading up, transition planning, managing projects, dealing with staff burnout, breaking down silos, convincing the board of the urgency of projects, being a change agent, and setting priorities. The following chapters will provide an in-depth look at theory and practice of modern organizational and individual success, the importance of understanding the challenge of change, and the best practices employed today. Models of museum leadership, organizational design, and leading from the middle will be detailed. The needs of preparing current and future staff to respond to today's challenges will be closely examined. This book will reflect observations and experiences of current museum professionals and feature detailed case studies of successful leaders. The overriding issue is that of values. Smithsonian Secretary David Skorton writing in *Museum Magazine* posed the question "What do we value?"¹² Without a clear answer to this question museums will flounder. Skorton suggests that approaching our mission through practice of creativity, innovation, and flexibility are imperatives as we seek to be agents of social change.

Discussion Questions

1. What current and future challenges are of concern to your museum?
2. Are the concerns and warnings defined by Robert Janes relevant today?
3. Which leadership skills are most important in the next five years?

Notes

1. Richard Florida, *The Rise of the Creative Class* (New York: Basic Books, 2002). Florida recently indicated that the growth phenomenon resulted in driving artists out of neighborhoods they can no longer afford to inhabit.

2. Julia Halperin, "US Museums Spent \$5bn to Expand as Economy Shrank," *Art Newspaper*, April 4, 2016, <http://theartnewspaper.com/news/us-museums-spent-5bn-to-expand-as-economy-shrank/>.

3. Cultural Policy Center, *Set in Stone*, University of Chicago, 2012, <http://culturalpolicy.uchicago.edu/sites/culturalpolicy.uchicago.edu/files/setinstone/index.shtml>.

4. Robin Pogrebin, "Metropolitan Museum Director Resigns Under Pressure," *New York Times*, February 28, 2017, https://www.nytimes.com/2017/02/28/arts/design/met-museum-director-resigns-thomas-campbell.html?_r=0.

5. Robert Janes, *Museums in a Troubled World* (New York: Routledge, 2009), 13–25.

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7. Emily Clark, "Workers Unionize, Demand Contract," *Wickedlocal.com*, August 25, 2017, <http://plymouth.wickedlocal.com/news/20170825/plimoth-plantation-workers-unionize-demand-contract>.

8. *Trendswatch* reports have been published since 2012. The Center for the Future of Museums research provides examples of how museums adapt to these various trends. See <http://aam-us.org/resources/center-for-the-future-of-museums/projects-and-reports/trendswatch>.

9. Arts Council of Great Britain, "Character Matters: Attitudes, Behaviours and Skills in the Museum Workforce," September 2016, http://www.artscouncil.org.uk/sites/default/files/download-file/ACE_Museums_Workforce_ABS_BOP_Final_Report.pdf.

10. Phillip Scarpino and Daniel Vivian, "What Do Public History Employers Want?" Joint Taskforce of AASLH-AHA-NCPH-OAH study, 2015, <http://ncph.org/history-at-work/report-public-history-education-and-employment/>.

11. Author surveys of Museum Studies graduates, individuals working at Smithsonian Affiliates museums, and other museum listserv members, 2012.

12. David J Skorton, "What Do We Value?" *Museum* (May–June 2016): 38–43.

“Martha Morris builds on the work of others both inside and outside of the museum field, often offering deep explanations. Each chapter of *Leading Museums Today* ends with discussion questions to guide personal and group reflection. This is definitely a book to be used to reflect on leadership and building leadership strengths. Noting that leadership is situational, how Morris addresses the various types of leadership—leading change, leadership transition, leading at all levels, and leading up—is exceptional.”

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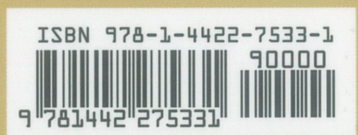
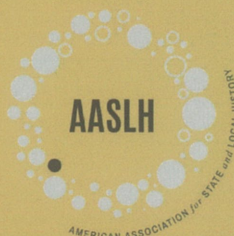
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In *Leading Museums Today: Theory and Practice*, readers learn about leadership theory in both for-profit and nonprofit worlds and how to effectively master the roles of both leader and follower. It explores the reality of change in the workplace, the standards and best practices of businesses and museums, and innovative approaches to creating a nimble and responsive organization.

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