



ASSOCIATION OF CHILDREN'S MUSEUMS

Museum leadership is a partnership between the executive director and the board; it is not a solo performance by either arm of governance.

Neither the strongest director nor the best board chair can lead alone. The two arms must operate in concert and in order to do that they each have to know their own strengths and weaknesses. So at the same time that we are asking how many museum boards assess their directors on a regular basis, we must also ask the analogous question: What percentage of boards assess their own performance?

Strengthening Museum Leadership through Assessment

Daryl Fischer, Musynergy Consulting

In recent years there has been a growing recognition of the value of assessment in museums and other informal learning environments. Organizations such as the Visitor Studies Association, the Committee on Audience Research and Evaluation, InformalScience and the American Evaluation Association offer conferences, workshops and on-line resources designed to increase the use and effectiveness of front-end, formative and summative evaluation of exhibitions, programs and services for external audiences. There also have been concerted efforts to measure more long-term outcomes for the individuals and communities served by cultural nonprofits (Indiana University IUPUI and Institute of Museum and Library Services 2010).

While museum staff and board members are wise to incorporate assessment of external audiences in their decision-making, they often fail to see the benefit that regular and rigorous assessment can have on internal audiences such as themselves and volunteers. Maybe it's lingering memories of school examinations that lead many board members to shudder at the thought of assessing the executive director's performance—let alone their own! But once they overcome past anxieties, they see how assessment builds confidence in individuals and in the institutions they lead. For the board, assessment can generate a spirit of reflection and inquiry that leads to a clearer sense of the museum's goals and priorities. For the director, objectively based assessment gives

a clear sense of where he stands, which provides a firm footing for managing staff and volunteers. For staff and volunteers, knowing that their leaders are held accountable for achieving performance goals improves morale and creates an institutional culture of continuous improvement.

Qualities of Effective Assessment

Since the mission statement is the touchstone for all board and staff activities, it is the sine qua non of any type of institutional assessment. Think of it as the bottom line for both asking the questions and interpreting the responses. Effective assessment is:

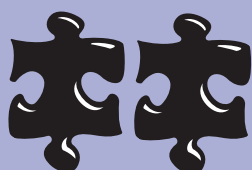
- comprehensive, providing a full picture of the two arms of museum leadership—executive and board;

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- systemic, focusing on the organization rather than individuals or personalities;
- rigorous, characterized by a thorough and accurate approach;
- objective, looking at performance and outcomes without bias or preconceptions and considering all perspectives;
- measurable, making the criteria for assessment consistent and clear to all parties;
- proactive rather than reactive, making it most productive when things are not in crisis; and
- provocative, inspiring dialogue and new ways of thinking about familiar issues and practices.

Start with Informal Assessment

Incremental change is often easier to assimilate than sweeping change so if your board doesn't yet assess the director or itself, it's best to start with small steps that create a level of comfort and build awareness of the benefits of ongoing assessment. One of the easiest places to begin is with **mini-evaluations of board meetings**—a few questions printed on a half-sheet of paper that take no more than three minutes to complete. For years I've recommended that my clients use variations on these simple but important questions suggested by Richard Chait (Chait 1993).

1. The issues covered in today's meeting were:

TRIVIAL				ESSENTIAL
1	2	3	4	5

2. The materials provided were:

WORTHLESS				VALUABLE
1	2	3	4	5

3. Today's discussions focus primarily on:

OPERATIONS				STRATEGY
1	2	3	4	5

4. The most valuable contribution we made to the museum's welfare today was...

Conducting **exit interviews with retiring board members** is another easy and valuable type of informal assessment. When trustees leave the board they are inclined to be reflective and are often willing to share their frank opinions. In a one-on-one conversation over lunch or a glass of wine, the board chair or perhaps a member of the executive committee or board development committee can pose the following questions.

- What is the most important contribution you were able to make through your board service?

- Do you feel that your skills and experience were well-utilized by the board?
- What has been the biggest change in the board during your tenure?
- What suggestions do you have for improving board effectiveness?
- How would you like to continue to support the museum now that you're stepping off the board?

Another useful and non-threatening evaluation option is **self-assessment**, which challenges individual board members to reflect on what they bring to the board. This can include objective data about each person's participation and level of contributions, as well as more subjective reflections on their attitudes about board service. A simple form can capture factual information like the number of board meetings attended, involvement in board committees and task forces, level of membership, annual contributions and donor solicitation efforts. A brief questionnaire can pose questions about the individual board member's understanding and support of the museum's mission, their role as a community ambassador, their appetite for board development opportunities and their familiarity with facilities, operations, programs and exhibits. At first, collecting and tabulating this data may be optional; simply getting board members to start thinking in these terms is an important step.

Implement Formal Assessment

Few would argue that an annual performance review of the executive director is best practice; but what percentage of museum boards actually give their directors this kind of feedback on a regular basis? I underscore the word regular to emphasize that I'm not talking about the kind of ad hoc evaluation that occurs when it comes time for a salary review; nor do I mean the type of reactive assessment that boards or executive committees engage in when the executive's performance becomes an issue.

According to a BoardSource survey, 74 percent of nonprofit boards conduct formal, written performance evaluations of their CEOs (BoardSource 2007). Drawn from the full spectrum of social service, education and health care NPOs, only 5 percent of respondents were from the arts and culture arena. To get a sense of how museum boards stack up, I conducted a very informal survey, asking a group of colleagues to estimate, based on their own experience, how many boards regularly evaluate their directors. Responses ranged from 5 percent to 100 percent, de-

pending on the size of the institutions and the experience of the boards. Since children's museums are often smaller institutions with younger, less experienced board members, the numbers are probably at the lower end of the spectrum. One colleague commented that when small museums do engage in assessment it is often at the impetus of the executive director, who suggests criteria for his or her evaluation and may even provide resources such as assessment tools.

Museum leadership is a partnership between the executive director and the board; it is not a solo performance by either arm of governance. Neither the strongest director nor the best board chair can lead alone. The two arms must operate in concert and in order to do that they each have to know their own strengths and weaknesses. So at the same time that we are asking how many museum boards assess their directors on a regular basis, we must also ask the analogous question: What percentage of boards assess their own performance? Half of those who responded to the BoardSource survey had engaged in board assessment, but of those, only 84 percent had done so within the past three years, suggesting that this is not always a regular practice. Here again, the estimates from my colleagues were less encouraging, ranging from zero to 50 percent.

This begs the question: Why aren't boards more inclined to assess their directors and themselves? Some boards misunderstand the distinction between governance and management, thinking that they need to stay out of their directors' way, giving them freedom and authority to manage the museum. But constructive evaluation is not meddlesome; it is how the board fulfills its responsibility to supervise the director, thereby improving performance *and* increasing job satisfaction (BoardSource 2007).

A general reluctance on the part of boards to judge and possibly offend their director is an obstacle to reflective and effective leadership. One colleague commented that she has served on boards that thought it insulting to evaluate the executive director! The irony is that the better the relationship between the board and the executive director, the less likely there will be any formal assessment because the board doesn't want to rock the boat.

Another reason systemic assessment is rare is that few boards have the expertise needed to create valid assessment instruments. However, a growing number of tools

that provide useful starting points are readily available. Read on.

A very real issue is the time it takes to conduct meaningful assessment. Given the fact that board members are busy people juggling multiple priorities, they may feel that assessment takes time away from other, more pressing demands of governance. While assessment may not rate high on the Urgency scale, it's right up there in terms of Significance. In fact, it can reveal latent issues before they become crises. Think proactive, as opposed to reactive. Think of the time spent assessing your board and director as investments in your museum's future—investments yielding dividends that will benefit your entire community.

For the board, assessment can generate a spirit of reflection and inquiry that leads to a clearer sense of the museum's goals and priorities.

For the director, objectively-based assessment gives a clear sense of where he/she stands, which provides a firm footing for managing staff and volunteers. For staff and volunteers, knowing that their leaders are held accountable for achieving performance goals improves morale and creates an institutional culture of continuous improvement.

Tailor Assessment to Your Institution

There is no one-size-fits-all assessment. If it's going to be a meaningful, assessment, it must fit the needs, challenges, vision and values of your museum. The best place to start is to form a team that includes the executive director and key board members. In addition to providing both perspectives, the active participation of the two arms of leadership will create a spirit of trust, a climate of safety and a foundation for constructive, mutually beneficial findings. Choose those who are in the best position to evaluate the performance of the director and the board to serve on the assessment task force. This might include members of the executive committee as well as other committees or task forces such as governance, board development, personnel or strategic planning. Be sure to include new board members as well as veterans so you can incorporate fresh per-

spectives on your board traditions.

Forming a team does not imply the need to start at square one. There are many helpful templates that can be tailored to the culture of your museum. *The Leadership Partnership*, written by the author and Barbara Booker and published by the Museum Trustee Association, is one such resource. A single volume includes four tools: a self-assessment that challenges individual board members to reflect on their own attitudes, participation and contributions; a board assessment that examines the board's collective performance from the complementary perspectives of the board and the director; a director assessment that measures the director's performance from the perspectives of both the board and the director; and a leadership plan to help the board and director identify individual areas of strength and weakness and ways to improve their collective performance. BoardSource has individual online assessment tools for the chief executive and the board (BoardSource 2010).

Convene the task force to come to consensus on assessment goals, explore various formats and tools, select the one that makes the most sense at this point in your institution's life cycle and then modify it to meet your needs. One question you will need to address is who is in the best position to assess the director's performance. In institutions with large boards all board members may not have direct experience working with the director. In these cases, the executive committee or personnel committee may conduct the assessment. But if your museum is small or in the early stages of its life cycle, it's likely to have a working board composed of members who have regular contact with the director. Whether the full board or a committee evaluates the director's performance, I recommend that the director also have the opportunity to evaluate her own performance using the same tool.

Putting assessment on board agendas, distributing the tools and tabulating responses are all relatively straightforward tasks. Once you've completed them, schedule a debriefing meeting with the task force and then share key findings with the full board. Be sure to allow plenty of time for questions and dialogue.

Make Assessment Meaningful

Though it may seem like the work is done, the most important part is still ahead.

Even the best assessment tools are without value unless information is translated into action. Unfortunately, many boards who do take the initial step of conducting an assessment fail to follow up by identifying action steps to address the findings. This is where the board's role in thinking and acting strategically comes into play.

So where do you start to unpack the feedback gathered in your assessments? What do you look for in interpreting the data? How do you come to consensus on what it means for your leadership team? The answers to all of these questions depend on the tools you're using but some general guidelines may be helpful. When you look at the data the first thing you might consider is the mean or average scores. It's also important to consider the distribution of responses because an average score of 3.5 means one thing if the majority of responses fall between 3 and 4; it means something very different if there are several 1s and several 5s. Standard deviation may sound like heavy-duty statistics but it's just a measure of how widely the responses are dispersed from the average. Areas with wide disparity between high and low responses are particularly ripe for dialogue.

After looking at overall scores you may also want to consider individual scores. If there are individuals whose responses are significantly lower than the norm, this may indicate overall dissatisfaction or particular issues that need to be addressed with these board members. It's often worth exploring these anomalies in one-on-one conversations.

All perspectives are valuable; in fact, in my experience it is often the observation that differs from the dominant view that


proves to be most valuable. In interpreting the results and identifying action steps, it's important to distinguish between discussion and dialogue. In a discussion you advocate in an effort to convince others of your perspective. In a dialogue you ask questions in an effort to better understand perspectives different from your own. After engaging in dialogue your task force will be in a better position to come to consensus on the priorities for strengthening the performance of both the executive director and the board in the coming year. Outline steps that will be taken in each area and you'll have a leadership plan that will improve their collective performance.

When it comes time to share the plan with the full board, remember that motivating individuals to change is challenging; motivating organizations to change can be downright daunting. It requires a special skill set to enlist individual support of collective goals. Look around the board table to identify individuals who have special abilities to inspire others and ask them to serve as internal advocates. They will play a key role in monitoring progress and continuing to ask challenging questions about leadership in your museum.

Continuous Improvement

Once each step has been assimilated in your board routine ask for feedback on the process. Assess the assessment. And then modify the process accordingly. This will not only improve your assessment tools and procedures; it will create a board culture of continuous improvement that permeates the entire institution. Like museum leadership

itself, assessment is an iterative process. One lesson builds upon the last and leads to the next. You're never through improving!

The bottom line is that effective assessment is not an occasional activity separate from board governance, but a regular and integral part of museum leadership. It inspires reflection, which helps boards and directors, as partners, to focus their attention on the how as well as the what of leadership. 

Since 1993, Daryl Fischer has been principal of Musynergy, a museum consulting firm that creates synergy between museums' internal audiences of staff, board and volunteers and their external audiences of members, visitors and community partners. Co-author of the Museum Trustee Association's four-volume Templates for Trustees, her fascination with board development grows from her own service on numerous boards.

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