



National Leadership Grants for Museums

Sample Application MG-249545-OMS-21

The Institute for Learning Innovation

Amount awarded by IMLS:	\$49,998
Amount of cost share:	\$0

The project description can be viewed in the IMLS Awarded Grants Search:
<https://www.imls.gov/grants/awarded/mg-249545-oms-21>

Attached are the following components excerpted from the original application.

- Narrative
- Schedule of Completion

When preparing an application for the next deadline be sure to follow the instructions in the most recent Notice of Funding Opportunity for the grant program and project category (if applicable) to which you are applying.

Museum Enterprise Leadership for FLAME

Project Justification

Strong museum education leadership has never been more needed. Museum education has been central to art museums since their inception, and recent findings from the 2020 Ithanka S + P [Inaugural Art Museum Director](#) survey (collected before the pandemic) demonstrated that art museum directors recently prioritized education as a primary function and an important strategy in delivering on mission. In fact, many expected to increase hiring for education staff (Sweeny & Frederick, 2020). However, as the pandemic hit, [museum educators](#) disproportionately bore the burden of layoffs and furloughs (Harris, 2020). While often decimating education departments, art museums are concurrently experiencing increasing demands for building new audiences, moving programming online, and leading onsite and digital equity. Investing in leadership, strategy and financial professional development will position education division directors to take a stronger role at the leadership table and is a significant key to the survival and thriving of museums. This project requests support from IMLS to help effect that support, which, in turn, will assist art museums in finding new strategies to connect effectively with their audiences.

In art museums, the vast majority of professionals in the position of Education Director hold backgrounds in art history, creative practice and studio art, education, or other humanities-based fields. Most have little to no business training and have learned management and organizational skills largely through osmosis and experience. Other professional associations such as NAEA (National Art Educators Association), MER (Museum Education Roundtable) and Ed Comm (The Education Committee of the Alliance of American Museums), address the practice of art education or museum education practice - but do not address the essential leadership and business skills Education Directors find themselves needing. Because education departments in art museums often hold the most significant relationships with community groups including artists, school boards, and special needs organizations, and usually lead the museum in building relationships with new or underrepresented audiences, their work is critical to delivering on a museum's public value and mission. Thus, supporting enterprise level leadership training for museum education directors will allow museums to become more relevant and engaged community partners, that better serve their audiences.

This project describes how three groups and organizations, FLAME, MEL, and ILI, have joined together to support museum Directors of Education, to access training in key areas that will strengthen their internal effectiveness and ultimately impact their broader communities. To precisely understand the aspects of leadership and impact of new business skills that are proposed in this historic moment, this project is a pilot of three intensive trainings designed and evaluated through a participatory evaluation model. This professional development will support the work of art museum education directors. Successfully realized, it will catapult this group into the leadership areas of innovation, policy change and community advocacy. It will also result in a strong understanding of how business and leadership professional development best supports the work of education leaders, knowledge and how this knowledge can support the field at large.

FLAME

To support this urgent and ongoing need to support museum education leadership FLAME (the Forum for Leadership in Art Museum Education) was formed in 2016, funded by the Kress Foundation. Led by Lynn Russell (The National Gallery, Washington D.C.), Anne Kraybill (formerly of The Crystal Bridges Museum of Art, presently The Westmoreland Museum of Art), Wendy Woon (The Museum of Modern Art, New York), Stacey Helnut-Hendrick (The Crocker Art Museum, California), Ray Williams (Blanton, Texas) and Rika Burnham (Frick Collection, New York), meetings of education leaders were held to discuss the need for a group much like the Association of Art Museum Directors (AAMD) and the Association of Art Museum Curators (AAMC). As a result of these conversations a new professional group was formed with the capacity to network and support the work of museum education at the highest level.

Since its inception, FLAME has grown from some thirty participants to a network of more than 400 Directors of Education in Art Museums that meet monthly to discuss issues and skills required to successfully execute the responsibility of this role. Over the past four years, FLAME developed into a community of practice (CoP) that provides support and delivers crucial professional development for Education Directors in art museums through monthly online meetings facilitated by Kimberly Young and Judith Koke. Prior to the onset of COVID, FLAME also supported two face-to-face convenings a year to investigate specific topics and build relationships among leaders in art museum education (for a list of previous convenings please see Appendix A). Currently FLAME is led by a Council comprised of 4 original FLAME leaders Anne Kraybill (Westmoreland Museum of American Art), Lynn Russell (until recently, The National Gallery), Rika Burnham (Frick Collection), Stacey Shelnut-Hendrick, Crocker Art Museum) and two new members (Joanne Lefrak (Site Santa Fe) and Amanda Kodeck (until recently, Walters Art Museum)). This council represents many decades of museum education experience in diverse geographic, collection-type and sized museums, offering diverse perspectives from which to advise this project.

Prior to FLAME, no organization existed to solely support the work of Directors of Education, including the acquisition of knowledge and skills required to both lead museum education divisions to do their best work in changing circumstances, and access to programs to prepare to lead at the enterprise level - exercising their skills, relationships, and strengths to meet the needs of art museums' futures. Recognizing that new kinds of expertise and networking were necessary, FLAME asked Judith Koke (a FLAME member and experienced evaluator) to complete a survey of FLAME members (See Appendix B) to inventory what skills and knowledge they lack, and which of the past presentations they most appreciated and found most useful. The results of this 2018 survey indicated an essential need for business and leadership training - everything from participating in conversations about leadership and community, museum finances, (including the work of finance committees), Board development and activation, improved negotiation skills and Diversity, Inclusion, Equity and Access leadership and leading organizational change.

To meet this need, and working closely with FLAME leadership, in 2019 Koke established a partnership with Kimberly Young, at the University of Mary Washington. Young, having led national and international EMBA and professional development programs at two universities. Familiar with the workings and challenges of art museums, she is an excellent resource and partner in the shaping of the professional development FLAME members needed and wanted. Over the course of one year, Koke and Young developed the [Museum Enterprise Leadership \(MEL\) Program](#) a year long certificate program somewhat like the [Getty Leadership Institute](#) or the [Center for Curatorial Leadership](#), but with a specific focus on the acquisition of the business and leadership skills identified

by FLAME members. Set to launch in June of 2020, the program began opened registration and prepared for launch.

With the onset of the pandemic, plans were suddenly disrupted, and with hindsight, perhaps for the better. The response of museums to COVID underscored the need for specific knowledge and skills, and, importantly, a different delivery system. Sudden changes in society require rapid changes in museums. For example, as the pandemic closed museums, many museum directors turned to their education department leadership to move programming online and to find new ways to maintain and grow relationships with audiences. Two months later, In May, many FLAME members report that beyond simply moving programming online, they are charged with finding methods to generate income from these new products and programs. These were issues MEL had not imagined in the preparation of a year long program. FLAME members need immediate support, knowledge, and skills in an innovative, participatory, and cost-effective way. The trial 'boot camp' approach (a month-long set of participatory sessions focussed on a specific skill or issue) offered this fall, showed itself to be a strong potential model.

Museum Enterprise Leadership

The Museum Enterprise Leadership Program (MEL) is a partnership between the Institute of Learning Innovation (ILI) and the University of Mary Washington (UMW), designed to deliver the enterprise business and leadership curriculum specifically needed by art museum directors of education. UMW has the robust infrastructure (marketing, learning management system, registration portal, Canvas site for student exchange) needed to support online learning. As well, UMW brings years of successful adult and professional learning experience, as well as access to experienced faculty in their colleges of Business, Art and Sciences and Education. ILI brings a deep history of museum learning and audience research, as well as a more recent focus on effective professional learning.

MEL's professional development delivery has been designed with a strong foundation based on evidence. Most professional development (PD) (72-80%) continues to be didactic and modeled on professionals' original professional education at university - knowledge transfer (Frank & Taylor, 2004). Research has demonstrated that, to be effective, professional learning needs to be interactive, related to immediate issues, offer multiple opportunities for cycles of engagement and reflection, and involve collaborative participation that creates trusting relationships and 'investigative cultures (Penuel et al, 2007)." Researcher Ann Webster Wright (2010) emphasizes that professional learning (PL) is as much about one's professional identity as about professional knowing. Traditionally, professional development opportunities are developed with much time invested in identifying the key facts and in presenting those facts in ways that are engaging and relevant – focusing almost exclusively on the professional knowing. In MEL we have instead invested significant thought into considering what it means to invest equally in how these ideas fit into the field of practice - how they connect to and grow from past understandings and how they change how individuals think about their practice and themselves. The strength of this program is presenting the business-related content developed in other industries, in such a way as to build a learning community in which the participants together create meaningful applications to their own field of art museums.

Institute for Learning Innovation

This year (November 2020) the Kress Foundation again supported FLAME with a 2-year grant to move the network under the umbrella of the [Institute for Learning Innovation \(ILI\)](#), and to develop a model for long term sustainability. The Kress grant does not support professional development efforts beyond the monthly online meetings. ILI, with decades of leadership in the Free Choice Learning

Landscape, is currently an administrative home and thought partner for two other professional development groups. In 2018, ILI became the host to [Portal to the Public](#) – and this year added the [Science Communication Trainers Network](#). Thus, ILI has experience making space for and supporting subgroups if the missions are aligned – which, in the case of FLAME, is certainly true. FLAME will be a microsite under ILI’s website. All to say that FLAME’s immediate future is secure and supported, albeit nascent.

This somewhat complicated interweaving of groups and organizations has come together to solve the problem, made even more critical due to COVID: how to provide the most effective leadership training for FLAME members that will help museums become true partners in their communities, demonstrating their relevance in these troubled times. The crucial areas are 21st century leadership skills, financial acumen, and sense-making - or choosing and leading teams in volatile, complex and uncertain times. The second of these builds on education divisions’ skill in developing community relationships. It is imperative that today’s art museums, to become or remain relevant, create new and long-term relationships with underrepresented audiences, addressing issues of Diversity, Inclusion, Equity and Access. Also important is that museums continue to innovate providing meaningful access and learning in the virtual world.

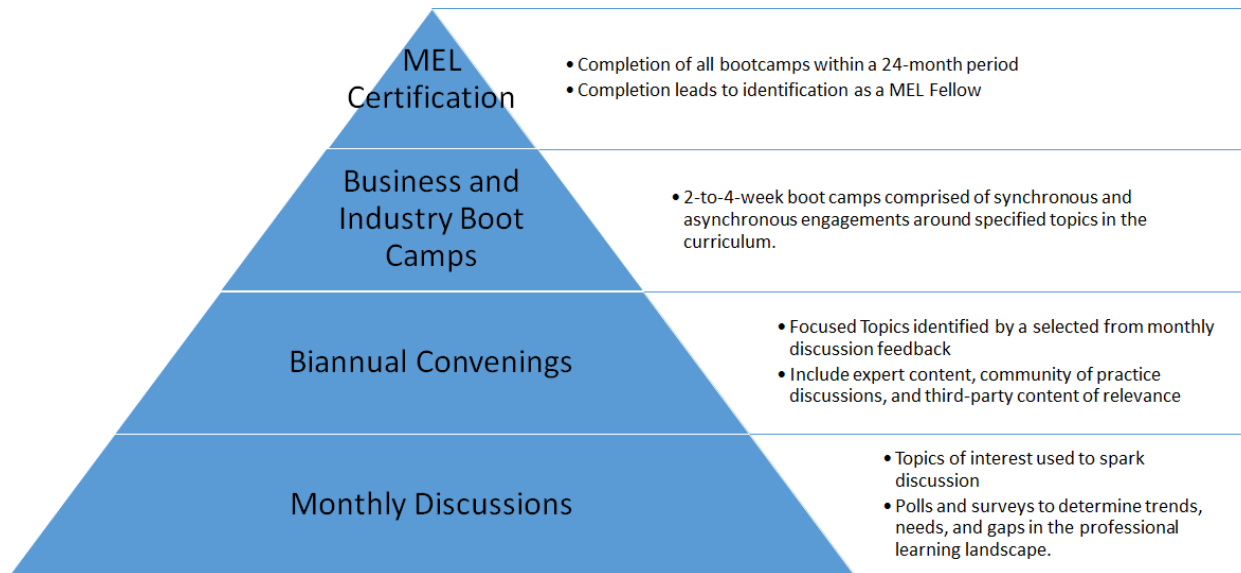


Figure 1.0 FLAME Model for Professional Learning

The work of FLAME and MEL can be imagined in a pyramid of increasing depth of learning experience. (See figure 1.0) At its base, FLAME (recently housed under ILI’s professional learning umbrella) is a Network and Community of Practice (CoP) meeting monthly to build and discuss issues, build relationships, and share solutions. Since the onset of COVID, Koke and Young have continued to support the FLAME community through monthly online meetings, responding to topics suggested by the group and finding experts, many from among Young’s MBA faculty contacts, to address specific issues such as: adaptive leadership (August), Communicating your Value (August) digital strategies (July), Diversity and Inclusion issues in digital access (May), supporting staff in times of chaos and uncertainty (April). This work has further shaped our understanding of the professional development topics FLAME finds applicable. However, a systematic approach to knowledge gaps is missing. The proposed Boot Camps offer focused, high-quality learning opportunities to acquire

knowledge and skills from other industries and disciplines and work with peers to apply them effectively to art museum challenges.

In sum, FLAME is a network of art museum leaders with clear and urgent learning needs. It has an elementary framework for sustainability that will be more fully developed over the next two years. MEL has a curriculum, based on the needs of the FLAME group, designed to be delivered over a year long program with onsite residencies, that cannot be delivered as intended. With funding we can pilot and evaluate three Boot Camps, based on the original MEL curriculum, in January through May of 2021. We will evaluate their efficacy and impact on the participants. Additionally, we will measure the impact of their learning experience through the perceptions of their Museum Director and leadership team peers as to how their enterprise-level leadership changed.

Project Work Plan

This prototype has two key activities: a) the presentation of three business and leadership Boot Camps designed in response to stakeholders' needs, and b) the evaluation of the impact of those Boot Camps on participants' ability to improve their enterprise level practice and leadership in their organizations. The evaluation and programmatic elements will be happening simultaneously (see Schedule of Activity) and inform each other. These activities will all happen under the direction and management of Co-PI's Koke and Young.

A. Boot Camp Pilot

September - December 2021: Program Planning

The first four months of this project will be dedicated to:

- defining criteria for diverse cohorts,
- developing and implementing a communication strategy to build registration,
- working with FLAME Leadership Council to develop a selection process for participants.
- finalizing curriculum and delivery of Boot Camps through participant review

January - May 2022

During the first part of 2022 we will work with participants of each Boot Camp to review and revise curriculum, define personal learning goals, and complete evaluation pretests.

Each of the Boot Camps has been drafted based on the input of FLAME members, research in best practices in professional learning and the input of faculty experienced in these topics. As their CV's attest (attached) that Drs. Bolman, Needles and Marsh are experienced MBA faculty and have deep experience in researching and teaching the topics assigned. Young and Koke will work closely with all three to ensure they understand the specific challenges and the art museum context. As well, all workshops will be informed by the review and pre-evaluation completed by participants and FLAME Leadership Council.

Together with FLAME, MEL develops programs tailored to the needs of this specific professional audience, based on 4 Pillars:

Enterprise Leadership: Building on an enterprise mindset, we balance the goals of each business unit with the broader strategic interests of the enterprise and are committed to developing the right capabilities within our organization and sharing resources and knowledge across the business.

Sense Making: We underscore the importance of sense making as a process of creating situational awareness and understanding in situations of high complexity or uncertainty, to make decisions.

Community of Practice/Network: As an active network of individuals with shared interest in the success of art museums in serving their communities, now and in the future, we create a forum for exchange and leverage relationships to innovate, share resources, knowledge, and skills to ensure the success of individuals and the group.

Financial Acumen: Building on existing budget management skills, the enterprise leader applies a broad understanding of financial management principles to ensure decisions are fiscally sound, strategic, and aligned with organizational values.

The topics defined as most important for FLAME members include: Leading Change Initiatives, Financial Analysis and Decision Making, Sense-making and the Strategic Mindset, Digital Strategic Plans, Building Board, Funder and Stakeholder Support, The Art of Negotiation, Motivation and Persuasion. The first three topics were most frequently requested, and hence form the basis of this project.

#1: Leading Change Initiatives

Change is about moving forward, evolution, and creating a sound pathway for individuals to implement and sustain new ways of working, engaging, and executing on the mission of the institution or the needs of its stakeholders. In this course, participants will be exposed to frameworks, models and strategies that will help them better understand the role of the change agent. They will become familiar with the concepts of innovation, urgency, relevance, and enterprise-wide implementation. Participants will be presented tools and frameworks to support the development and implementation of change initiatives, common mistakes, and executive leadership strategies needed to support enterprise-wide change.

#2: Sensemaking and the Strategic Mindset

Every organization is subject to the volatility of the environment in which it operates. To advance the organization, its leaders must understand the environmental context as well as the actions and opportunities available to them as they consider the future of their organization and industry. For museum education directors, it is critical that they not only understand the industry environment, but also the broader context of the world in which their audiences operate. This understanding will drive them to develop programs that are more meaningful, more engaging, and therefore, more valuable to their institution and their audiences. Using Design Thinking principles and Sensemaking, participants will document the environmental context in which their organization operates and the implications on their audiences and the programs they create.

#3: Financial Analysis and Decision Making

While education directors are fluent in budgeting and maintaining a balanced budget for their span of responsibility, this course will elevate their skillset and help them to think of new projects and initiatives in terms of the financial impact on the organization. This course will lay the foundation for confident financial decision-making and give participants a firm grounding in financial analysis. Participants will learn about and develop comfort with the elements of Balance Sheets, Income Statements, and Statements of Cash Flows for Art Museums. They will be presented with tools to analyze how these statements indicate key decisions made by museum leaders and how those decisions can influence future projects and initiatives.

Delivery

The outlines for these four-week, online programs will be further informed by participants and FLAME Leadership Council, and then piloted in January, March, and May of 2022 (see Schedule of Activities). Presented online they will comprise 2.5 hours a week of class (1.0 asynchronous and 1.5 hours synchronous) and be supplemented with weekly assignments and readings. Participants will establish personal learning goals at the beginning of each session and use that outline as part of the consideration of the program's success. Participants will be advised to commit 4 hours a week to this program (2.5 of class and 1.5 of assignment/reading) for a total of 16 hours. The bootcamp will enroll approximately 20 students in each class, a good class size for programs with both large group and small group discussion. Either Koke or Young will participate in each session to observe group interaction and offer feedback to faculty to ensure conversations and assignments are deeply connected to needs and context.

June-August 2022

After the completion of the Boot Camps, and ensuring we have received all pre- and post-materials from participants, we will:

1. Reach out to the museum directors and the leadership peer each participant has recommended to explore their perceptions of the impact of this program in terms of the participants participation in financial, leadership and strategic conversations and initiatives.
2. We will host three focus groups with participants from all boot camps to gather deeper insights into the impacts of the programs, and to review the survey findings and peer input. In this manner the survey findings (comprising both quantitative and qualitative questions) will be placed in context and yield richer findings. As well, focus groups will draft initial recommendations.
3. All evaluation data, findings, focus group transcripts and draft recommendations will be reviewed by and finalized with the FLAME Leadership Council. Dissemination plans will be developed by this group.
4. Develop a final report written by Koke and Young. Koke and Young will also lead the development of a written element for AAM's Center for the Future of Museums, or its journal, *Museum*.

B. Evaluation Plan

This proposal has frequently referred to FLAME member's question: *What is and how do I access the business and leadership professional development I need to operate in my organization more effectively at the enterprise level?* However, the evaluation question for this proposal investigates the potential of this co-developed solution to that question.

Project Evaluation Question: Do workshops of these bootcamps' content and delivery methods meet the needs of and advance the practice and perceived leadership role of FLAME members?

Approach

As Directors of Education, FLAME members have varying degrees of knowledge regarding evaluation – all are frequent consumers of visitor research and evaluation and their evaluation skills range from

beginner to expert. All have spent significant time developing effective learning opportunities for museum visitors of all ages. They bring a deep knowledge of the problem, the context, and potential solutions. They are, in fact, the perfect sample to partner in a participatory evaluation process. By participatory evaluation we mean applied social research that involves trained evaluation specialists and practice-based decision-makers (primary users) working in partnership (Cousins & Earl, 1992).

Evaluation is a systemic inquiry leading to judgements about program merits, value, and significance, leading to program decision-making (Weaver & Cousins, 2004). In participatory evaluation the evaluation expert (Koke) leads and supervises the evaluation, in partnership with the participants – it engages the stakeholders in the investigation. Participatory evaluation is responsive to local needs while retaining sufficient technical rigour to ensure high quality, valid results. In participatory research or evaluation, the participants are engaged in instrument design, data interpretation, recommendations and final report writing. The study is a joint responsibility.

The strength of this participatory approach in working with this group is linked to the Anne Webster Wright finding (described above) that the key weakness in much of current professional development is the focus on knowledge and skills to the exclusion of professional identity changes and processes. By playing a part in the evaluation and reflecting both in and on their practice, participants may be surprised by what they notice, observe, and understand, and hence, rethink their practice. By engaging the stakeholder group in the evaluation process, the interpretation of data is deeply embedded in the context of the problem – which here is the ability to access business and leadership knowledge and skills in a way that elevates confidence, engagement, and leadership roles. Key characteristics of this approach are that it draws on existing capacities by recognizing the wisdom and experience of end-users and offers improved end results as stakeholders are creative and knowledgeable about their environment and issue. While this approach, naturally, has its challenges (who determines participation; who ‘owns’ the findings; creating an even playing field for stakeholders of different experience levels; etc.), they are far outweighed by the strengths the approach offers, and will be somewhat mitigated by engaging the FLAME Leadership Council.

Method:

1. **Participant Selection:** A diverse group of primary users will comprise the participant group – considering diversity from multiple angles including (but not limited to) museum size, years in field, educational background, geographic location etc. Selection criteria will be developed by Koke, Young and the FLAME Leadership Council to develop as diverse a group as possible, from within what is currently a homogenous group (white, upper middle class, well educated women), frankly, typical of current art museum leadership.
2. **Question Refinement:** In participatory evaluation the first step is to articulate and define the problem requiring investigation. This step has largely been accomplished in a participatory manner through ongoing surveys and conversations with the group and defined as the evaluation question above.
3. **Design:**
Boot Camps: Led by Kimberly Young, the curricula for three specific Boot Camps have been drafted, based on FLAME needs and faculty input. The drafts of these curricula will be reviewed by FLAME Leadership Council and selected Boot Camp participants in fall 2021 to inform final program design.

Evaluation: The participatory evaluation approach, instruments and findings will integrate participant recommendations into the design of evaluation methods and instruments. Participants and the Leadership Council will also review findings and participate in forming recommendations.

4. **Collect:** Data will be collected by online survey from all participants at the beginning and conclusion of each Boot Camp, as well as outside stakeholders.
 - a. Prior to the Boot Camp, instruments will be shared with participants and FLAME Leadership Council for review and modification. Pre instruments will collect information about current challenges, learning goals, and expectations for the program. Post instruments will investigate learning, program design and planned practice changes.
 - b. In July, when bootcamps have been completed for several months, Museum Directors and an identified Leadership Team colleague will be sent an online survey for feedback regarding perceived changes in participants' contribution, knowledge, and practice.
 - c. In July three focus groups will be held with participants to reflect on the programs, learning and participants' ability to improve their practice and leadership role in their organizations.
5. **Analysis:** The data will be reviewed and organized by Koke and Young, with some preliminary findings summarized. A full data set and the first level summary will be shared with FLAME Leadership Council and all stakeholders for review, critique, and enhanced analysis. The final report detailing the importance of key aspects of business and leadership PD will reflect the views of the many, while directed and led by expert evaluator Koke.
6. **Disseminate:** A final report will be shared first with FLAME members and IMLS. Findings will also be shared to inform future ILI professional learning research. Significant findings will be applicable to all museums and free choice learning environments, and every effort will be made to publish on AAM blogs or publications. (see dissemination plan below)
7. **Act:** The results of the study will inform all future MEL and FLAME professional development. Participation in the study will offer art museum directors of education enhanced skills that change their practice as well as additional experience with evaluation.

Project Results

This pilot study will yield important information and understanding regarding the impact of high-quality business and leadership professional development on the practice of museum leadership. The current and future participants will be better positioned to support and lead museums in the years to come. The shared findings have the potential to inform future professional development programs in all museum types and roles, both for IMLS and its support of the field, as well as for FLAME and other professional associations. Having begun with current art museum leaders, the application of these findings to emerging leaders in museums, libraries and other free choice learning fields is a significant future opportunity. The pilot study is extremely well positioned to support the goal of National Leadership Grants (NLG) for Museums to address **critical** needs of the museum field and that have the **potential to advance practice** in the profession so that museums can **strengthen services** for the American public.

This is a low-risk project. The leadership and support of the membership is certain. Koke and Young have long experience in the delivery and evaluation of professional development programs. The participatory evaluation design ensures multiple perspectives are integrated into the interpretation of results and recommendations. Support from IMLS ensures that current museum financial stresses will not become a barrier to participation, and that results have the potential to influence future IMLS

professional development programs. Current Kress funding for FLAME supports the work of finding a sustainable model for this organization that can, in turn, integrate the results of this work into future program delivery for the long term.

Dissemination

The participatory nature of this project ensures a group of individuals, already in leadership roles, will assist in the dissemination of this project's findings during their daily roles, and, in fact, integrate learnings into programs they develop. FLAME members, located in all 50 states, and in museums of various sizes, are active in many professional and national associations and will feel a sense of ownership over findings and recommendations in response to having participated in their development. FLAME Leadership Council is committed to sharing these results through conference presentations, online workshops, or publications. Koke and Young will submit a proposal to AAM for the 2023 spring conference as well as disseminate results through professional journals such as *Journal of Museum Education*, *Curator*, and *Museum Management and Curatorship*.

