

## *The Leadership Partnership*

### User's Guide Introduction

Museum leadership is a partnership, not a solo performance. The best director can't lead alone, and neither can the strongest board chair. The responsibility for governing and guiding a museum is shared among the board of trustees and the director. Each has a distinct but complementary set of responsibilities, which together provide the basis for strategic thinking, policy making, and management. In an ideal situation, both partners—the board and the director—are strong and vital, carrying their full weight of responsibility. In the reality of most institutions, each has strong points and weak spots. Identifying these makes it easier for trustees and directors to capitalize on each other's strengths and compensate for each other's weaknesses.

Board assessment plays a critical part in organizational learning. It challenges board members and directors to look at things analytically so that all aspects of leadership are taken into the mix; systematically so that even long-established traditions and familiar patterns are examined; broadly so that all perspectives are considered; and regularly so that assessment is seen as a normal part of the leadership—and the learning—routine.

*The Leadership Partnership* consists of four templates. The first three are designed to help trustees and directors identify their individual strengths and challenges. The fourth template will help them focus on improving their collective performance. First, individual board members are challenged to look within themselves and assess their own effectiveness. Next, they are asked to look around the board table to evaluate the collective performance of the board. Then they are ready to focus their attention on the director's performance. With summaries of these three assessments, the board and the director can engage in a dialogue about the best ways to strengthen their partnership and advance the museum's mission. Incorporating tools that measure both the board's and the director's performance is what sets this process apart from stand-alone board or director assessments. As one director put it, "The goal is to try to make our governance as a whole the best it can be."

These assessment tools challenge trustees and directors to view their performance from multiple perspectives. Each arm of governance has different and valuable viewpoints

that can inform the other, contributing to a broader picture of the partnership and leading to more effective performance for everyone. It's not enough for the board to evaluate itself by looking around the table. The director needs to share what he or she sees of the board from the executive office. In the same way, the board cannot assess the director's performance without factoring his or her perspective into the assessment equation.

### **Assessment Benefits All**

Many museum trustees approach assessment with fear and trepidation, which may date to their memories of taking tests in school. Decades later, they may be uncomfortable with pressures to perform according to someone else's standards. The idea of being evaluated may be especially unappealing to individuals who generously volunteer their time and share their resources. But once the benefits are realized, the process actually builds confidence in individuals and in the institutions they lead. While the board and director have much to gain, the benefits of regular, mutual assessment extend far beyond the leadership circle.

- For the **board**, clearly articulated criteria and accurate, easily understood data help everyone come together to focus on shared assumptions about the organization's goals and priorities.
- For the **director**, assessment that is based on objective criteria rather than subjective opinion provides a firm footing for management. Knowing where he or she stands, it is easier to lead staff and volunteers.
- For the **staff**, assessment of the board and the director creates clearer goals for staff performance and clearer criteria for measuring the effectiveness of exhibitions and programs. Staff and volunteer morale will increase when the director and the board model effective assessment.
- For the **community**, assessment of the board and the director gives the museum's constituency increasing confidence in its leadership.
- For **funders**—government agencies, private foundations, corporations, or individuals—assessment demonstrates that the board is self-reflective. Funders especially appreciate assessment that notes areas of improvement in museum leadership.

## What is Effective Assessment?

To maximize the effectiveness of the *Leadership Partnership* templates, everyone involved in the assessment process should subscribe to certain values. Effective assessment is

- **comprehensive**, providing a full picture of the leadership partnership and the governance process;
- **analytical**, examining individual aspects of board and director roles;
- **objective**, helping both arms of governance to look at their performance without bias;
- **systemic**, focusing on the entire organization rather than individuals or personalities;
- **mutually beneficial**, helping trustees and directors to perform better with input from one another;
- **measurable**, making the criteria for assessment as clear as possible to all parties;
- **specific**, focusing on leadership in museums rather than nonprofits in general;
- **regular**, becoming a routine part of the governance process;
- **proactive** rather than reactive, making assessment most productive when the museum is not facing a major problem or crisis; and
- **provocative**, inspiring dialogue and getting people to think in new ways.

## The Touchstone for Assessment

Mission is the touchstone for all board, staff, and volunteer activities, and it must be kept in mind in all types of individual and institutional assessment. When the American Association of Museums' Accreditation Commission reviews a museum for accreditation, it asks this core question: How well does the museum achieve its stated mission and goals? The commission states: "An accreditable museum has a clear sense of mission and organizes its governing authority, staff, financial resources, collections, public programs, and activities to meet its formally stated mission." To remind board members and the director of the reason for their efforts and to help them measure their effectiveness, these templates keep the museum's mission statement front and center.

## Living, Learning Boards

Boards are dynamic, living organisms, ever growing and changing. As such, they are best understood when viewed over an extended period. A single assessment is like a

snapshot; it captures a picture of the leadership partnership at a particular moment. The board and director can step back and ask, “How can we get ourselves in a little better shape? How do we want to look the next time someone snaps a picture?”

It helps to remember that we all look different at different times in our lives. That’s why it’s important for museum leaders to monitor the effectiveness of their partnership over several years. These templates include trend files to record and compare data from year to year. After gathering enough data to suggest a trend, executive and board leaders should ask, “Is this a pattern we want to continue or one we want to reverse?” In board dynamics, as in physics, inertia is a powerful force. If the leadership partnership is strong and healthy, chances are good that it will continue to grow and flourish. If the partnership is weak, chances are it will continue to falter until the critical issues are identified and the necessary changes made.

Effective assessment is not an occasional activity that is separate from board governance, but a regular and integral part of museum leadership. It inspires reflection, which helps boards and directors to become aware of the *how* as well as the *what* of leadership. Reflecting on executive and board decisions will bring continual improvement in the decision-making process. Reflecting on board meetings will help museum leaders make better use of their time together. Reflecting on board composition and structure will build boards that can advance their museums’ strategic priorities.

With opportunities to provide regular feedback, trustees and directors alike will grow more comfortable evaluating and discussing their own performance. Once boards get in the habit of reflecting on what they’re doing and how they’re doing it, they’ll see that assessment is one of the most valuable of all governance routines. Weighing accomplishments and measuring progress against goals is a way of thinking and acting strategically. It is something that effective leaders do instinctively.

In addition to regular self-assessment, it’s important for boards to solicit the opinion of objective outsiders. Every few years it’s a good idea to seek help from a consultant, a director of another museum, or a member of other another nonprofit board. Moving beyond the realm of self-perception to incorporate the perspectives of others with

governance experience will help museum leaders see their own institutions in new ways and develop new approaches to familiar challenges.

Outside facilitators can help in several ways. They can keep discussions open and focused on the issues. They can bring a fresh perspective and see beyond individual differences that sometimes divide members of the board. Outsiders may also be able to uncover “invisible” issues that are so much a part of the institutional culture that they won’t surface in an internal assessment or discussion. After reviewing the results of the board and director assessments, some boards may wish to ask an outside facilitator to lead a discussion at a special meeting or board retreat. If there is a wide disparity in responses on certain issues, an outside facilitator might be helpful in bridging the gaps. Or, if there is strong consensus in the negative, a facilitator might suggest new approaches that may not come out of internal discussions.

### **About the Templates**

*The Leadership Partnership* includes four templates: . . .

- The **Self-Assessment** (Template 1) examines individual board members’ attitudes, participation, and contributions. . . .
- The **Board Assessment** (Template 2) examines the board’s collective performance from the perspectives of trustees and the director. . . .
- The **Director Assessment** (Template 3) is analogous to the Board Assessment, examining the director’s performance from the perspectives of the board and the director. . . .
- The **Leadership Plan** (Template 4) is a PowerPoint presentation to help identify areas of strength and weakness, agreement and disagreement and to develop a plan that balances and strengthens the leadership partnership. The presentation includes 18 slides to guide a dialogue between the board and the director.

*The Leadership Partnership* also includes a list of publications and organizations that provide useful resources on board and director assessment.

## **Invest the Time**

If your board has no formal means of assessment, be assured that you're not alone. Many boards don't spend time evaluating their own performance. Perhaps that's because assessment takes time away from the other demands of governance, which often seem more pressing.

It's true that assessment does take time, but the leadership partnership is worth spending time on. When you consider the leveraging impact of boards, a few hours invested in assessing their effectiveness seems a small price to pay for improved performance that will benefit their institutions and the communities they serve.

Another reason that formal board assessment is rare is that few boards have the time or the expertise needed to create assessment instruments. These templates eliminate the front-end work of developing questionnaires and response tallies so boards can get right to the important work of reflecting on their individual and collective responses. If they wish, individual boards can tailor these instruments to their own needs by referring to the notes in "Working with the Templates."

We estimate that individual board members will spend 20 to 30 minutes completing each of the three questionnaires and a few hours discussing the findings at a board retreat. The board chair, the director, and members of the Executive or Governance Committee will spend several more hours reviewing the data and considering the strategic implications. Depending on the size of the board, the board liaison will spend 60 to 90 minutes entering the data on each of the three questionnaires.

There's no doubt that these activities represent a significant investment of time and energy, but it is a small percentage of the total time the board spends in a year. Think of it as time invested in the leadership partnership that will pay big dividends in terms of board and director performance in the future. Like financial investments, the dividends can't begin to multiply until you jump into the market. So go ahead—get started now.

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