

Report to the Field: The Status of Succession Planning in New York State Museums

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Professional excellence through partnership



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Preface

This report stems directly from our previous research on next-generation leadership of museums in New York State. When we first saw the staggering retirement statistics from other parts of the nonprofit sector and the anticipated leadership and workforce gaps that would result, we polled our membership about the extent of formal succession planning being undertaken and found to our amazement that 91 percent of reporting institutions had no succession plan, written or otherwise.

Using a broad definition of succession planning that encompasses leadership capacity building for all staff, volunteers and boards, MANY embarked on a year of research, which was generously funded by the New York State Council on the Arts. A written survey and two rounds of focus groups quickly revealed several things: the very term ‘succession planning’ is almost universally not well understood; an affinity for the concept has a great deal to do with where a person is in his or her career trajectory; and since the likelihood of adding succession planning to an already long “to-do” list is slim, it needs to be integrated as seamlessly as possible into the profession’s culture.

MANY believes there are a variety of actions we can take now (or further emphasize in a more coordinated way) that can help to focus our attention on the collective care and feeding of the profession for the next generation.

Many people have had a role in the creation of this document. A formidable list of people agreed to advise us throughout the project and to read and comment on the paper's drafts. They are, with our thanks, **Dean Anderson**, Interim Museum Services; **Therese Braddick**, Executive Director, Historic House Trust of New York City and MANY Board Member; **Fabiana Chiu-Rinaldi**, Museum Program Associate, New York State Council on the Arts; **Terry L. Davis**, President & CEO, American Association for State and Local History; **D. Stephen Elliott**, President, New York State Historical Association and MANY Board Member; **Des Griffin**, Gerard Krefft Memorial Fellow, Australian Museum, and a leadership/management consultant; **Kristin Herron**, Director, Museum Program, New York State Council on the Arts; **Geri Thomas**, President, Thomas & Associates, Inc.; and **Susie Wilkening**, Reach Advisors.

The valuable advice and leadership of **Catherine Harris** went well beyond her original role on this project as evaluator. In addition to planning the survey and focus groups with us, she summarized their findings in amazing detail. She also agreed to expand her role by serving as the focus group facilitator for the second round of discussions.

Our sincerest thanks to **Joan H. Baldwin**, the author of this paper, whose deep personal commitment to this project allowed her to wade through reams of focus group notes, emails, articles and statistics to create a cogent analysis of what we heard and read. MANY is truly grateful for her willingness to take on such a massive assignment with all its nuances and interrelated issues.

We hope this is just a start. And we hope this work will help inform discussions across the country.

Anne W. Ackerson, Director

Background

At a museum's heart are two things: collections and leadership. They are twin engines that power New York's museums and historical organizations. Used imaginatively they can change and transform even the smallest organization. Misused or ignored, they can stunt growth and leave a visiting public bored breathless.

Since 2000, the Museum Association of New York (MANY) has been actively involved in standards development, board training, and peer review at the state level. Underlying many of these issues is the overarching question of leadership. In the beginning, our goal was to get a reading on management among the 12,000 New York museum employees, who administer everything from all-volunteer historical organizations to New York City's mega-museums. Our initial questions grew into a yearlong study, supported by the New York State Council on the Arts (NYSCA), and ultimately a white paper, "Who's Next: Questioning the Future of Museum Leadership in New York State," published in April 2006.¹

Beginning with questions about demographic change, we learned that our community, like non-profit organizations nationally, was poised to weather a sea change that would see a record 65-percent of its leaders retire by 2020.² The first of them, we discovered, were already leaving. With one generation going, MANY wanted to know who waited in the wings and were they prepared to take over? The answers were surprising. Each response posed more questions, about recruitment, retention and professional development to name a few. And the next generation of leaders? They had complex questions of their own some of which are still waiting to be answered.

Information gleaned from focus groups with staff from a dozen museums and historical organizations, in addition to graduate students and faculty from five of the state's nine museum studies programs, formed the core of the white paper. The paper closed with a four-part agenda, laying out questions and challenges for MANY itself, its state and national partners, the broader community of museums, and New York's museum graduate programs.

Opening the Door on Succession

A year later, as we looked toward another research project, the questions that pulled us back were about succession. Not yet part of museum culture, it is a word with many definitions. In fact, based on a 2004 MANY survey 91-percent of the state's museums are without written succession plans while the for-profit and many parts of the non-profit world are awash in them.³ Yet we know the museum field, like the rest of its non-profit cousins faces leadership change. When MANY looked at museum leadership, it saw museums and historical organizations trapped in the present where day-to-day needs take precedent, and planning, especially planning for an organization's human capital, takes a back seat.

Putting human capital first and investing in staff—whether directors, middle management or those just beginning their careers—will make individual organizations and the field as a whole more competitive in a world where the pool of potential employees is growing smaller

1 Joan H. Baldwin. *Who's Next? Questioning the Future of Museum Leadership in New York State*. MANY, April 2006

2 Baldwin, 3. See also *Up Next: Generational Change and the Leadership of Nonprofit Organizations*, July 2005

3 Museum Association of New York. *Salary and Benefits Survey 2004-2005*, " 57.

and competition more cut-throat. Failing to invest in staff limits the museum field's diversity when talented individuals are lost to higher paying jobs elsewhere. And it does not take a rocket scientist to understand the museum field is overwhelmingly white and female.⁴ While that alone is not a bad thing, it may be emblematic of the field's slowness to change and adapt. And what is succession planning if not change on both a personal and an institutional level?

For this study MANY examined the many meanings of succession, finally settling on the following: Succession planning is a broad spectrum of strategies that build overall organizational capacity by stimulating self-assessment, evaluation, personal and organizational development and continuity for board, staff, and the executive director.

In defining succession we questioned whether it had a role beyond being a sidebar to an emergency plan. What if the definition stretched to accommodate nurturing, mentoring, and investing in staff? Would that change leadership as we know it? We also wanted to identify barriers to succession planning and understand how they might affect new data collection, and looking forward, we plan to develop a tool kit exploring succession's benefits, strengths, and possibilities. From the beginning, we knew that leadership and more particularly change in leadership, was a topic where everyone—from graduate students who one day hope to become directors, to mid-career professionals weighing the cost/benefits of staying in place, to long-time CEOs—had a story to tell. And a story where everyone owns a piece of it is a story worth telling.

Exploring Succession Planning: The Online Survey

Early in 2007, again with support from NYSCA, and having assembled an advisory team of human resource consultants and museum representatives, MANY turned to Catherine Harris, an evaluation advisor, to conduct a field-wide survey in addition to a series of focus groups. The survey went online in April and May of 2007, attracting 101 respondents, and yielding 54 pages of results. More than half the respondents were baby boomers, 24 percent GenXers, 15 percent Traditionalists, and seven percent Millennials.^{5;6} Two thirds of the participants had worked in their current positions five years or less and the majority (58 percent) work as administrators. And the reason they entered the field? Not money, prestige or reputation, but the work itself. MANY also asked about operational budgets, and based on the answers discovered no correlation among budget size, succession planning, and understanding leadership needs or inspiring emerging

“Succession planning is a broad spectrum of strategies that build overall organizational capacity by stimulating self-assessment, evaluation, personal and organizational development and continuity for board, staff, and the executive director.”

4 Marjorie Schwarzer. *Women in the Temple*, Museum. May/June, 2007, 1.

5 Catherine Harris. *Succession Planning Study: Report of Findings*, Museum Association of New York. December 2007.

6 See Neil Howe and William Strauss. *Millennials Rising*. Vintage Books, 2000, for definitions of generational groups.

leaders. So while money always helps, the ability to identify leaders, inspire the next generation or carry out a succession plan is not something peculiar to large or financially secure institutions.

Just as in 2006, we heard a wide variety of definitions for succession. Some survey respondents connected it to larger institutional planning. One wrote, "I think of planning to make sure that operations, programming, and collections will be maintained as well or better than I do when I, and others move on." A few linked succession planning with an emergency, replacing a CEO in the event of an accident, illness or death. For others it was definitely about people. Comments ranged from the succinct: "Planning for the future in terms of manpower," to the frustrated, "The plan for what to do when senior management retires or more likely drops dead because they NEVER LEAVE." Some online survey participants saw succession as something beyond a slow dance with personnel, suggesting that losing staff



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meant chipping away at institutional memory. "What happens to an organization when current staff and key volunteers move on?" one asked.

Eighty four percent of those answering the survey did not have succession plans in their museums. Many said they had never thought about this type of planning while others saw their own directors and boards as disengaged. "The board doesn't see it as necessary. The Director is

too busy with 'critical issues' to devote time to it" a respondent wrote.

Having asked survey participants to identify their generational group, MANY was able to look at how age might affect individual attitudes toward succession planning. Not surprisingly, many of those who felt it was important were baby boomers. "We have 25 percent of our organization eligible to retire. Replacing that staff will be a challenge," one wrote. Another said, "We've invested significant time and money in developing a shared vision under my predecessor and the board should ensure that it is realized, not reinvented by a successor."

By the mid-point in the survey, succession's complexities were obvious. Like its mission- or project-driven cousin, strategic planning, succession planning is *all* about people. It touches all paid and volunteer personnel on a personal level, from board members to staff and volunteers which is why it is most often conflated with hiring staff. But if an organization understands that succession is not solely about hiring the right person, nor is it being prepared to hire the right person. It is also about nurturing, mentoring and investing in staff. That is what gives it a personal edge that few strategic plans possess.

To try to get at issues underlying recruitment, MANY first asked participants whether succession planning was relevant to them, and second how their institutions prepare current staff to move into leadership positions. Eighty six percent responded, some with frightening succinctness. “Those who are hungry take what they want,” wrote one. One third of the group reported they had received training opportunities outside of their job. While institutional size did not seem to affect openness to succession planning as a whole, it does affect training. Small organizations do not provide much in the way of outside training, citing limited staff size and budget constraints as the principle reasons.

Exploring Succession Planning: Focus Groups

Toward the end of spring, with the survey results in hand, MANY went on the road, con-

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ducting four focus groups for trustees, directors, emerging professionals and department heads. The trustees group met first. While trustees took the rap for much museum malaise in later discussions, this group saw succession or the cultivation of leadership as part of their role. One remarked, “What’s the number one responsibility? Fiduciary, but number one is also good leadership.” But they also saw this type of talent planning co-joined with strategic planning. “Structure follows strategy,” one said. “It’s hard to talk about succession planning without a strategic plan and job descriptions.” And they believed firmly in the ladder: that it exists; that staff could and should move up; and that it is the CEO’s role to see that they do. They recognized though that it is easier for larger institutions with personnel committees and departments, than for smaller one-person operations. One suggested, “There should be some sort of process of swapping, for

example, a mid-level person in a bigger institution with a lone director,” adding that this might provide both a small institution and a mid-level employee from a large institution with a low-or-no-cost form of management training.

The danger of focus groups is also their strength: that a room full of individuals ends up speaking for the wider community. In the case of the initial director’s group, they represented—if not the naysayers—then the skeptics. Asked what came to mind when they heard the words succession planning, one answered, “The kind of plan that makes a lot of sense, but something that can be put off,” while another said, “It sounds like a corporate model or another animal.”

When questioned about their role in preparing current staff for leadership positions, most directors responded that working in small-to-medium-size organizations was a plus, providing ample opportunity for cross training and shared responsibility. “I throw everyone in a room and say, ‘This is the problem of the day’ and because of our size everybody has a sense of ownership,” one said. Another acknowledged that size matters albeit in a different way. “My difficulty is that one trustee comes out of the insurance world and thinks there ought to be ready backup for all staff leaders. Some departments are departments of one.” When it came to their own positions, the directors were quick to point out succession’s pit-

falls. “There’s a little bit of an elephant in the room in the sense that [succession planning is similar to] we’re all planning our own funerals, and I’m in this career for awhile.” But another countered, “I’m planning my succession so I can leave. This is just another stop on the train. We’re kicking so much butt: there will be a time I go.” After hearing these comments, a MANY board member remarked that planning for succession is the job of *every* director. He suggested it was *not* a choice, but a responsibility. But good succession planning is partnership, not some perverse form of paternalism. The same board member went on to say, “It’s incumbent on all serious museum professionals to know what they want [professionally] and to articulate it to somebody. It won’t drip down from the trees.”

From the directors group MANY moved on to meet with department heads. There the generational differences became pointed. After the opening question—“What do you think of when you hear the words succession planning?”—the first response was “I think of my dedication to my job right away. Baby boomers look at their jobs and work themselves silly. How will we find someone to go the extra mile [like I do]? Where is someone as dedicated as it’s possible to be?” But for younger staff succession was not about replacement, but continuity.

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“I think of continuity and turnover. We have a large and relatively young staff with a lot of turnover. Every time someone comes in we’re relearning so we are always catching up. I’m part of the flux at this point.” Asked about how their organizations identified future leaders, this group married the idea of staff management to leadership growth and thus succession planning. They also seemed to suggest that succession planning—indeed any kind of planning—was a global and very positive way of thinking about an institution. “Some planning is like breathing,” one responded. “If you don’t have it, you waste away like air or blood. But if there’s a lot of thought given to big issues those kind of decisions get ingrained at every level and it’s not a whim any more.”

By the fourth group, the emerging museum professionals, the focus switched to moving up the ladder, mentoring, and the personnel-driven nature of the work place. Based on their opening remarks, succession is not the most-discussed topic at their organizations. “I had to Google the term,” one quipped. While another said, “I’ve never worked for an institution that identified its succession plan publicly,” adding, “I’ve worked for many institutions, but it feels like organizations don’t expect to train you.” A third suggested that talking about succession planning was akin to talking about one’s will. Noting that both topics are personal, this participant was surprised when a co-worker shared the news that she was going to retire.

When asked how their respective organizations moved employees up, one responded, “They identify staff needs, but not leadership needs. It’s a great opportunity, but there’s no promotion and no more money.” And participants drew a sharp line between being sent to conferences and leadership training that is more focused and individualized. “Even though our institution is pretty good about conferences, I’m not sure it’s for leadership. It’s to keep me happy.” Nor were these young professionals confident that more planning—for succession

or otherwise—would necessarily change things. “It’s tough making standards in a field that’s so diverse,” said one. “There isn’t enough time,” concluded another.

Digging Deeper: Institutional Memory and Human Capital

In discussion after the focus groups, MANY identified several topics that deserved more probing. Questions of what institutional history means and when and why it is useful, how and whether staffs are valued, and who makes organizational change dogged all of the summer’s conversations. Each one was entwined with the bigger question of succession in an almost Biblical fashion: institutional memory begat generational issues; low salaries begat turnover; and turnover creates a catch-22 that sometimes precludes substantive change. MANY decided to dig deeper, scheduling three more focus groups for emerging museum professionals, directors, and department heads. (While the job categories were the same as earlier discussions, the participants were all new, although in the end winter weather forced the cancellation of MANY’s final discussion.)

“We have volunteers who’ve been with us 20 years and board members who’ve been with us since the beginning. But we also have a history of eating our young.”

The department heads met first. They focused quickly on institutional memory and its impact on succession planning. Everyone recognized its importance, but it is clearly a double-edged sword. One participant remarked, “In going through our business plan, we’ve realized that institutional memory is strong, but it hinders creativity: knowing history is important, but 15 years later is it a good thing?” Another said, “We have volunteers who’ve been with us 20 years and board members who’ve been with us since the beginning. But we also have a history of eating our young.” When MANY asked whether their institutions valued their personnel, the answers were also mixed. Value was measured in perquisites and outright compensation. While many were grateful for travel to conferences or mini-sabbaticals, they were clear that time away without a clone to attend meetings and answer email comes with its own pitfalls. The group opined that institutions with high turnover have little time to nurture staff. Instead everyone’s energy is invested in bringing new hires up to speed.

The group found diversity was yet another wrinkle in the complex picture of succession planning. At one level these museum leaders worried their institutions were not tolerant. “I think tolerance has a lot to do with lack of diversity in small town New York state. If we are a community museum, we need to do a better job in tolerating and understanding different audiences,” one remarked. Another was even blunter. “We’re supposed to be the community’s museum and our board doesn’t live in the community. They’re rich old people. We raise the admission because the board says to, but then half the community can’t visit.” Regarding diversity and personnel their thoughts were similar. Attracting a truly diverse staff—meaning age, race and gender—outside a major metropolitan area was a tricky proposition. “I see reality around this table,” one said. “There are mostly women at this table.”

MANY's last stop among the focus groups was a second group of directors. Unlike the earlier group, the directors were decidedly practical in their approach. For them institutional memory is a given. Some suggested an organization's policies and history should be written down. Several spoke about arriving on day one, their predecessor having left sick or angry (pick one) to discover vital pieces of their museum's story missing or worse the contents of the former director's desk piled into boxes with no known filing system. But some felt that even with good record keeping staff turnover ran rough shod over something intangible. "Policies are an outline," one said. "But the passing of information from person to person is what's important and there's always one person that you say if she were to leave I don't know what I'd do." Another made a connection between institutional knowledge and hiring. "That's the advantage between hiring in-house versus going outside. I sometimes wish we had someone to throw in a position because I realize it's going to take a year to learn it completely."

Asked about human capital the directors spoke almost exclusively about the time necessary to nurture staff. A few expressed regret that the very real needs of their organizations left their staffs hungry, while others acknowledged the time it takes to deal with employees one-on-one. While supporting staff with day-to-day problems is laudable, based on our previous discussions there is clearly a disconnect between what the earlier groups of emerging leaders and department heads felt about human capital.

As for who nurtures the director, there was agreement that the director's position can be a lonely one. One participant suggested all board presidents be trained to manage and nurture executive directors. "You learn to self nurture," another said. "But you can develop relationships with board members or in meetings like this," one said, before adding, "This is not a job for self pity." Moments later he suggested dog ownership for CEOs who want support, "If you need nurturing get a dog."

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All the directors were conscious of creating a ladder within their institutions. Unlike the emerging professionals who bemoaned its absence, the directors seemed to feel employee advancement was their responsibility. Even in essentially horizontal organizations, they felt adding a rung to the advancement ladder improved morale.

An Agenda for the Future: Making Succession Planning Part of Museum Culture

By December MANY had witnessed and documented seven conversations about succession in addition to the online survey that had rippled through cyber space the previous spring. But beyond the fact that New York's museum community is articulate, hardworking and occasionally spectacularly witty, what had we learned?

The most over-arching theme was also the most obvious: There is pervasive uncertainty about how and why succession planning takes place. For those familiar with the term, the primary stumbling block to implementation appears to be time. There isn't enough of

it. More than a few participants suggested succession planning becomes part of museum culture. They linked it to strategic planning, and imagined fund raising that invests in building talent. But succession planning is not simply an efficiently run human resources office nor are good succession plans just about emergencies. They also build a culture of mentoring and leadership development that can sustain an organization—and ultimately the museum field—over the long haul.

Not surprisingly generational issues provided the background music in our discussions and our online survey, offering differing perspectives depending on where participants were in their professional lives. A long tenure in the field generally meant more support for the notion of succession planning and institutional memory as staff reflected on questions like

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“Who will come after me?” or “What will happen after I leave?” Younger employees, on the other hand, acknowledged that from their vantage points, succession planning was not an issue they heard or thought very much about, and while a written organizational history might be useful, it also had the potential to stunt new ideas.

Based on this study, it is time for MANY and for the field as a whole to reinvest in leadership. What makes a good leader, how can leaders best be developed, and should all leaders be mentors? As evidenced in the focus groups the idea that it is an honor to be involved in the museum field no longer seems to have legs. GenXers and Millennials want more. They were frank about what makes them abandon a position. No ladder, no promotion, no growth, coupled with a dearth of mentors, spells trouble for many emerging professionals. Perhaps some of these questions need to be addressed in the graduate programs or when graduate students enter the field. The financial world offers newly-minted graduates a road map where the end of the journey is a leadership position.⁷ Within the museum community it is sometimes difficult to find the leadership track; instead, emerging leaders look to mentors who may or may not be available.

The emerging leaders also suggested that change agents are not necessarily people, but often a process or project that has institution-wide impact. For them, it is action that keeps them in the game. They cited finishing a major assignment or grant application or completing the accreditation process as change agents more often than an individual (a director) or a group (the board).

Nor are there guarantees that staying in place will mean a move up the ladder. In some New York museums and historical organizations, there is little opportunity for promotion from within because they are too small. Clearly boards at these institutions must look outside for leadership, particularly when they want new skill sets or direction. That sometimes generates push back when a board goes a step further, choosing someone from outside the field to run an institution. How can boards, particularly at small and medium-sized institutions,

⁷ See <http://www2.goldmansachs.com/careers/your-career/ongoing-training/index.html> or <http://careers.randomhouse.com> for two examples.

better understand that investment in human capital pays back in different but important ways just as more traditional investment in buildings and renovation?

Generational differences were less obvious when it came to questions of museum staffing. Regardless of their place on the ladder, participants acknowledged that problems with retention and turnover hinder growth and cause burnout. At some institutions leadership is little more than a history of transition as the museum continually redefines itself in terms of its new CEO. At its worst, mission and personality change places so that an institution becomes mostly about its director, the kind of place where everyone knows what the CEO wants, but few can articulate the mission. The most common issues in retention are: lack of money to attract the best candidates; burnout when a current leader wears too many hats; and no defined ladder or possibility of promotion, which leads to stepping-stone institutions that serve as paid internships for want-to-be directors, selecting a new one every couple of years. These institutions fail to recognize that moving the entire organization forward enough to offer better pay and more benefits might attract someone with more sophisticated leadership skills. Conversely, investing in a younger first-time leader might net an institution a longer-term commitment. But these things do not happen by accident. An investment in leadership is succession planning.

Further, the absence of human resource professionals at many small-to-medium-sized organizations clearly impacts personnel decisions. Many museum professionals, not to mention boards of trustees, have little or no training in how to manage or nurture staff. At larger institutions CEOs have human resource offices to fall back on. Their size forces them to deal with many succession issues in ways that smaller organizations do not or cannot. But having a human resource office does not guarantee a nurturing organization.

Investing in Talent

While succession planning may be something few New York state museums or historical organizations practice, how might leadership in the museum community change with a commitment to talent building? Think what might happen if each of the state's 1,900 institutions operating without succession plans ensured that at least one key employee was familiar enough with the executive director's duties that he/she could accomplish them in the event of a sudden or prolonged absence.⁸ Or imagine the result if executive directors and boards of trustees invested in their staffs on a regular basis, committing to building the promotional ladder, promoting staff and raising salaries especially at small institutions? And

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⁸ Hildy Gottlieb. *Succession Planning: The Elephant in the Room*. Help4NonProfits.com, 6.

what would happen if strategic plans put the human factor first? And how would the field as a whole change if it committed to mentoring young leaders in a systematic way from graduate school to mid-career and beyond?

Museum leadership and governance in the 21st century are complex, too complex to assume good leadership just happens, and attracting and retaining good leaders is a concern for all New York museums. Succession planning is an important counterpoint to leadership. It requires partnership between management and staff, and openness about professional needs and desires. It means investing in each and every staff member, paid or volunteer, to insure they perform at the top of their game. To quote Compasspoint's *Daring to Lead*, "Bench strength, diversity, and competitive compensation are critical factors in finding future leaders."⁹ What museum does not want good management at every level, board, director, and department head? While this investigation was a core sampling, not an exhaustive study in leadership strategies, MANY believes good management coupled with talent building keeps organizations nimble, ensures continuity, and perhaps most importantly, defines opportunities for the next generation of leaders.

“Museum leadership and governance in the 21st century are complex, too complex to assume good leadership just happens, and attracting and retaining good leaders is a concern for all New York museums.”

9 Jeanne Bell, Rick Moyers and Tim Wolfred. *Daring to Lead*. Compasspoint, 2006, 3.

Next Steps for Making Succession Planning Part of Museum Culture

	NOW	FUTURE
For Individuals	<ul style="list-style-type: none">● Recognize professional development needs and articulate them to those who can help you meet them.● Encourage your graduate programs to offer leadership training opportunities.● Encourage your professional associations to offer training and mentoring opportunities.	<ul style="list-style-type: none">● Assist with or take leadership of development of training opportunities.
For Institutions	<ul style="list-style-type: none">● Create a written emergency succession plan as the first step to opening succession discussions.● Integrate succession planning issues into existing strategic plans.● Consciously and consistently nurture a “back bench” of leadership staff.● Encourage institutional commitment to developing human capital, particularly at the mid-career level.● Support mid-career training opportunities, including mentorships and sabbaticals.● Actively monitor executive job satisfaction.● Develop boards that support succession planning and leadership development at all levels in the institution; that understand the particular professional development needs of the emerging leader and lone professional and that will encourage the use of existing tools to educate boards and/or senior staff about succession planning trends and leadership development.● Ensure equality of women and people of color in hiring and compensation.● Insist upon competitive pay, institutional support of the emerging leader and lone professional, and diversification of governing boards.	<ul style="list-style-type: none">● Support cross training within and among institutions.● Work collaboratively to address issues of gender bias and inequity.● Develop boards that support leadership at all levels in the institution; that understand the particular professional development needs of the emerging leader and lone professional and that will encourage the use of existing tools to educate boards and/or senior staff about succession planning trends and leadership development.

Next Steps for Making Succession Planning Part of Museum Culture

	NOW	FUTURE
For MANY	<ul style="list-style-type: none"> ● Heighten awareness of the need for succession planning. ● Develop resources to help institutions address succession planning issues. ● Continue commitment to board education about succession planning best practices and sustaining the professional development needs of organization leaders. ● Promote the value of professional development training and mentoring. ● Support mid-career training opportunities, both in-state and out-of-state. ● Develop opportunities for emerging leaders to network with veteran professionals, graduate programs and each other. ● Insist upon competitive pay, institutional support of the emerging leader and lone professional, and diversification of governing boards. 	<ul style="list-style-type: none"> ● Honor and reward institutions that nurture staff and provide opportunities for professional growth. ● Be the matchmaker in a statewide mentoring program; work collaboratively with regional and national associations and funders to identify and train mentors. ● Work with graduate programs to incorporate succession planning into course work; provide programs with resources. ● Address issues of gender bias and inequity.
For New York state's museum service agencies/regional and national professional associations	<ul style="list-style-type: none"> ● Focus on succession planning in its broadest sense as a key ingredient to building next-generation museum leadership. ● Collaborate in collection and dissemination of data regarding succession planning trends and needs. ● Continue commitment to board education about succession planning best practices and sustaining the professional development needs of organization leaders. ● Focus on succession planning; convene leadership-focused affinity groups; offer executive transition advice and referrals. ● Develop, facilitate, and/or promote succession planning training opportunities. ● Insist upon competitive pay, institutional support of the emerging leader and lone professional, and diversification of governing boards. 	<ul style="list-style-type: none"> ● Honor and reward institutions that nurture staff and provide opportunities for professional growth. ● Continue to support successful internship and mentorship collaboration/placement. ● Recognize and honor mentoring throughout the field. ● Work collaboratively to address issues of gender bias and inequity.

Next Steps for Making Succession Planning Part of Museum Culture

	NOW	FUTURE
For Graduate Programs	<ul style="list-style-type: none"> ● Introduce succession planning in course work. ● Work with MANY to track the professional trajectories of graduates; analyze trends. ● Work with MANY on creating and promoting leadership training opportunities. ● Create scholarship programs specifically for leadership development. 	<ul style="list-style-type: none"> ● Implement tracks of museum leadership study leading to certificates or degrees. ● Implement leadership/managerial partnerships with MANY. ● Work collaboratively to address issues of gender bias and inequity.
For NYSCA and other funders	<ul style="list-style-type: none"> ● Support succession planning, staff leadership training, mentoring, coaching and networking through special funding initiatives and Get Set/Go Grants. ● Expect and fund realistic infrastructure costs; encourage organizations to embrace realistic salaries and professional development opportunities. ● Consider awarding increases in GOS funding to institutions that incorporate succession planning and mid-career training in their ongoing human resource planning. ● Focus on board and staff leadership development with special funding initiatives. ● Insist upon competitive pay, institutional support of the emerging leader and lone professional, and diversification of governing boards. ● Work with MANY and the state's museum studies graduate programs to track the professional trajectories of graduates; analyze trends. 	<ul style="list-style-type: none"> ● Consider supporting managerial and leadership internships. ● Work collaboratively to address issues of gender bias and inequity.

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