Top 10 Issues Faced by First Time EDs

A 2020 NEMA Session for New Museum Directors and Directors-To-Be

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Overview/Premise

In 2019 NEMA launched the “EDCoP” program for first-time museum directors to share their experiences and learn from experts in the field. In this panel, a few EDCoP participants will share their struggles and successes and answer your questions before you step into your first directorship.

1. Learning on the job
2. Finances
3. Change of Identity
4. Working with Boards
5. Staffing
6. 24/7 Nature of the Job
7. Balancing Work & Self-Care
8. Timeline of the Job
9. Gender & Age
10. Long-Term Career Plans
Learning on the Job
Where to Begin?

- Tracy Baetz - start by choosing one thing to be good at
- No matter how much you prepare, there are things you don’t know (and you may not have help)
- Promotion from within vs. being hired from outside
  - Either way, you bring knowledge of some aspect of museum management
- Get the fullest picture you can:
  - If you already work at the museum, ask to go to board meetings
  - If you are coming to new museum, look at materials that you can (990s, website, staff to program ratio, offerings and events)
  - Ask whose responsibilities are what – prepare for an onslaught of work yourself
  - Plan for worst case scenario and be happy if it’s not that
Training for a Small Museum

How do I learn when I can’t find time to learn?

It’s easy to get overwhelmed with good ideas and bad trouble

- keep up with what’s happening in the field, but pace yourself.

- Put your ideas in a binder, and think of it like your mini-strategic plan – check them off as you can and grow into your role.

Where to look for help (refer to our collection of helpful resources)
Finances
Starting with Basics

- Don’t start out alone: Find support (treasurer, financial professional, best practices)

- Understand your Museum’s financial present (& past)

- If not already in place, develop a step by step process of cash management based on accounting best practices and what works best for you.

- Learn how to create & read Spreadsheets (Quickbooks?) and interpret Profit & Loss statements

- Payroll is Number 1
Change of Identity
The Learning Curve

- Your relationship with peers changes
- Learning new skills along with unlearning many things you previously knew requires a psychological adjustment
- It is lonely at the top
- Fellow EDs understand and will lend support
Working with Boards
Ideal vs. Reality

How a board SHOULD work = what we all dream of

- Everyone will raise money
- Everyone will volunteer for everything we ask for help with
- Someone will take charge of the gala and figure out the napkin color so you don’t have to
- They all appreciate your work and say a word of thanks or give a boost of morale once or twice

How a board probably works

- AT BEST:
  - Doesn’t get personal
  - Board ignores some of what you say because they see you as young or inexperienced (or, at least inexperienced with their museum)
  - Don’t respond to your asks for help (or, sometimes do)
  - Don’t contribute a whole lot unless asked very specifically

- AT WORST:
  - Are actively working against your success
  - Gets incredibly personal and oversteps
  - Doesn’t take the lead on strategic decisions
  - Knowingly or unknowingly risks the institution by risking its financial standing (back to the first lesson — more from Eric in a minute!)
The Basic Confusion of Any Nonprofit Board

➤ Most volunteer personal time outside of professional life
  ▪ seem to leave all professional/HR training at the door, though in their professional lives they would know better.

➤ They come up against people who WORK at the Museum as employees and professionals.
  ▪ There are two very different standards at play and you really have to keep this in mind so you won’t be surprised or disappointed.
Who’s the Boss?

- Most descriptions = Board hires ED to manage operations
- Know ED’s responsibilities and authority vs. Board’s responsibilities
  - NOTE: most descriptions say ED hires other staff – you are boss of staff, not Board.
- Emphasize volunteer vs. board “hats”
- Boards like mine, for which I am thankful - look to you to guide the conversation
  - This is a wonderful vote of confidence, but can also make decision-making a very lonely and risky process.
- “Who’s the boss” power struggles are where the most rancor comes from – be aware that power disputes appear in a variety of ways that you need to learn how to recognize and sort out in a professional way.
  - sidebar comments, outright anger, seeming to sabotage a program or project, not following requests, or not responding, anything like that.
  - Point of personal suggestion – always be professional and courteous and no one will be able to call you on anything other than that.
General Considerations

- Ensuring you get an annual review (Cautionary tale)
- Issues with communication and who does the work
  - Say what you expect – get the Board to help write an expectations document
  - Be clear, be specific as possible: “I need John Smith to help me with xyz”
- How do you interact? And who gets to interact (staff...)
  - Lack of response/feedback vs. Too much response/feedback
  - Can board members talk to staff? Pitfalls here.
- Literally draw an organizational chart
- When you are ready, start having clear and intentional conversations at the board level about specific standards. Uncomfortable, but necessary.
- Relationship with Board President
  - The goal: someone who backs you up, has confidence in you, acts as sounding board – especially for personnel problems or other private issues.
  - Check ins weekly or biweekly – best in person or at least just an email
  - Lonely at the top, but this person should be the closest to having a partner
It is an oft-repeated line, but one that is true in all the years I’ve seen it in action:

“Ask for money, get advice. Ask for advice, get money.”

► In this case, while money is nice to have as well, we are talking about honest investment on the part of trustees.

► You are asking specific trustees for advice on – [FIND THEIR TALENT].

► Be personal, targeted and specific in your asks – when they feel involved and interested, the entire institution wins.
Staffing
Inheriting Staff

➤ Assume the position! Expect scrutiny.

➤ Refine, don’t reinvent yourself.

➤ Be Prepared. Present your staff with a brief transition outline that emphasizes improvement, renewal & team-work

➤ Meet individually with staff members: know their job descriptions & reviews. Listen to their input.

➤ Learn individual expectations (discover unhappiness)
Changing Staff

» Leadership change is often seen as an opportunity to air grievances. Staff unhappiness can sometimes be resolved.

» Can you work with those that undermine your authority or express continued allegiance to the previous Director?

» Review Museum HR policies. In none are present, consider HR on Demand or consult standard practices. Implementing an HR policy is a long-term project.

» Others will judge your effectiveness in the way you handle this.

» Eliminating insubordinate staff can be tricky. Know your options.
24/7 Nature of the Job
Starting Strong

➡ Managing Expectations (Yours and the Board’s)
  - Communicate Needs - personal and organizational
  - Set Boundaries - may change over time
  - Revisit Job descriptions - Board, Management, Staff & Interns

➡ Finding Routine and Structure
  - Setting an institutional calendar
  - Radical prioritization
  - Track hours and tasks
  - Expect to be derailed
  - Document changes/developments in procedures (to avoid this)
Ongoing Considerations

- Budgeting Personnel and Time
  - Always leave extra time for completing projects
  - Be realistic about how much help you’ll get
  - Don’t overbook meetings and phone calls
  - Refer to Mission and Strategic Plan

- Mitigating and working through burnout
  - Space out big projects and events, Front-load work when possible
  - Working from home when vacations aren’t possible
  - Communicate when you’re at your limit. Adding a new project means dropping an older one.
Balancing Work & Self-Care
Making Space for Yourself

- Separating job from self-worth
- For Recent Graduates: Unlearning the academic calendar
- Give yourself breaks, permission to “unplug”
- Don’t underestimate the simple things
- Ask friends and family to alleviate personal stressors
- Find mentors & communities of peers for advice & support
Timeline of the Job
Personal & Institutional Timelines

► Figure out your priorities
► You won’t know the full cycle until you’ve been on the job for at least a year
► Nonprofits are designed to work slowly and by group consensus
► Everything can seem like a priority; learn to triage AND communicate your reasoning
Gender & Age
Asserting yourself as the boss against yours and others’ misgivings

- Overcome your insecurities
- Surround yourself with people who believe in you and bring out the best in you
- Practice resilience
- “Care Personally / Challenge Directly” (Radical Candor)
- See resource list
Long-Term Career Plans
Watch the road, not the wall

- You will survive the learning curve and become resilient
- Step back from time to time and think about your whole career journey
  - What is your passion? Are you fulfilled? Is it worth it?
- Evaluating when it is time to move on
- No shame in stepping out of the role if it doesn’t fit your life plans
- Stay connected to your ED peers for support
Questions?

Comments?

Resource Sharing!