



Museum Leadership in Dynamic Times

An IMLS Leadership Convening

March 2–3, 2023 • Washington, DC

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EXECUTIVE SUMMARY

On March 2–3, 2023, IMLS brought together nearly 100 museum leaders from across the field in Washington, DC, for the *Museum Leadership in Dynamic Times* convening—representing the diversity of the field by size, discipline, geography, and identities—to discuss lessons learned and remaining questions from the challenges that emerged starting in 2020, from decision-making in the face of a global pandemic to understanding how to respond to widespread community unrest. During this time, museum leaders demonstrated resilience and an eagerness to learn—leaning into the inspirational and healing role of museums in times of crisis; their importance in the preservation of our rich heritage; and the invitation of all to share in their missions. These new and strengthened capacities helped many museums respond to the call to create new opportunities for dialogue and healing.

The day-and-a-half-long program was structured around plenary sessions that introduced high-level concepts facing museums leaders followed by structured small group discussions that gave participants space to share evidence-based practices, burning questions, and inform future strategies for field capacity building at IMLS and beyond. The structure and content of the program was informed by a thorough scan of available literature, market reports, and articles and blogs.

The program was organized around general sessions that introduced and explored significant issues followed by small group discussions structured to allow attendees to engage in dialogue and knowledge sharing. General sessions were moderated by IMLS staff and included:

- Adam Kirsch, noted poet and author, in dialogue with IMLS Director Crosby Kemper, III, on the existential need for museums in a world of increasing virtual interactions;
- Dr. Zannie Voss (SMU DataArts) and Peter Linett (Slover Linett) in a moderated discussion on how we can leverage data for better understanding the social value of museums in community; and
- Two panels of museum CEOs, representing the breadth and diversity of the field, discussing their lived experiences and insights on the changing nature of museum leadership and different approaches and models of organizational sustainability.

Attendees participated in group discussions (by region, discipline, etc.) following each general session, which were structured to result in documentation intended to be useful to both IMLS and the field at large. The outcomes of these discussions are detailed in the full report, with major themes impacting museum leadership that emerged across discussions summarized below.

Challenges and Opportunities for Museum Leaders

- **Support for Board Development:** The social and financial shifts of the past three years presented new opportunities for rethinking the composition and mandates of museum boards. New resources are needed to support the evolution of board representation.
- **Articulating Sustainable Financial Models:** Availability of public funds at the municipal, county, and state levels varies widely by state and region. The piecemeal and volatile nature of these funds matched with fluctuations in admissions and philanthropic funds are a challenge to long-term financial planning—especially for basic operational expenses such as facilities maintenance and collections preservation.
- **Supporting the New Museum Workforce:** The pandemic forced major changes across the museum workforce, from increasing unionization efforts to recovering from layoffs to managing four generations in the workplace. More than ever, museum leaders at all levels are looking for support and skill-building in management and workforce development skills.

These outcomes will be used to inform future IMLS funding opportunities and the creation of a research agenda focused on museum management and leadership for IMLS, individual museums, and universities to use in informing funding investments and other sector practices.

CONVENING SUMMARY

Goals

The *Museum Leadership in Dynamic Times* convening was conceptualized as a strategy for IMLS to fulfill its mission to advance, support, and empower America's museums, libraries, and related organizations through grantmaking, research, and policy development. An in-person gathering presented an opportunity to:

- Reactivate IMLS as a field convener
- Serve as a forum for post-pandemic information sharing and connection
- Inform future IMLS priorities for field support in the areas of
 - » **Grantmaking:** Improve grantmaking efforts to better support the museum field with their emerging needs
 - » **Policy:** Identify more opportunities to share, convene, and discuss leading best practices and innovations in the museum field.
 - » **Research:** Support creation of a research agenda focused on museum management and leadership for IMLS, individual museums, and universities to use in informing funding investments and other sector practices.

Topics

Based on a thorough environmental scan of academic articles, field-wide data reports, and practitioner articles, the convening was designed around five ideas:

- **Institutional Excellence:** Is the definition of institutional excellence changing?
- **Managing Workforce and Social Issues:** How can museums improve the quality of life for those who use them and also be respectful of staff lives? How can museums serve community needs?
- **Financial Models and Fiscal Stability:** What are key financial metrics? How are donor motivations and funder requirements changing?
- **Managing the Board Effectively:** What are the models for recruiting, orienting, training, and assessing trustees for the modern museum's needs?
- **Addressing Environmental Sustainability:** What are the investments and priorities for ensuring the resilience of the nation's museums and collections?



Speakers

Convening speakers were selected to represent the breadth of expertise and diversity of the museum field, including museum executives as well as thought leaders from the broader humanities and research sectors.

General Session Speakers



Kirsten Ellenbogen
*President & CEO, Great Lakes
Science Center (Cleveland, OH)*



Lori Fogarty
*Executive Director, Oakland
Museum of California
(Oakland, CA)*



Terri Freeman
*Executive Director,
Reginald Lewis Museum
(Baltimore, MD)*



Magdalena Garcia
*Founder and Executive
Director, El Museo Latino
(Omaha, NE)*



Adam Kirsch
*Poet and Literary Critic, Editor
of the Wall Street Journal's
Weekend Review section
(New York, NY)*



Peter Linett
*Co-Founder & Catalyst, Slover
Linett Audience Research Inc.
(Chicago, IL)*



Zannie Voss
*Director, SMU DataArts and
Professor, Arts Management,
SMU's Meadows School of
the Arts and the Cox School
of Business (Dallas, TX)*

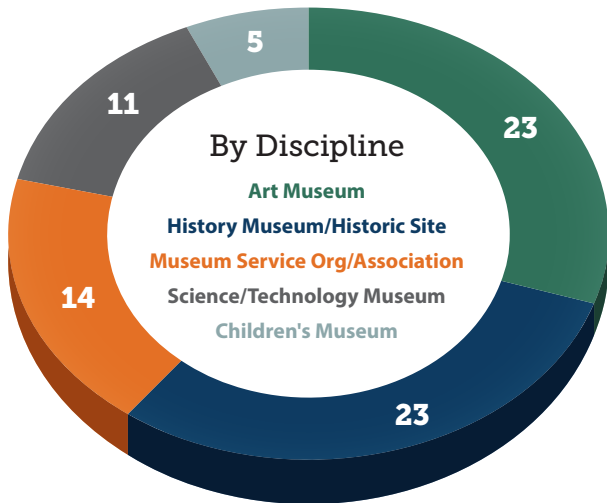
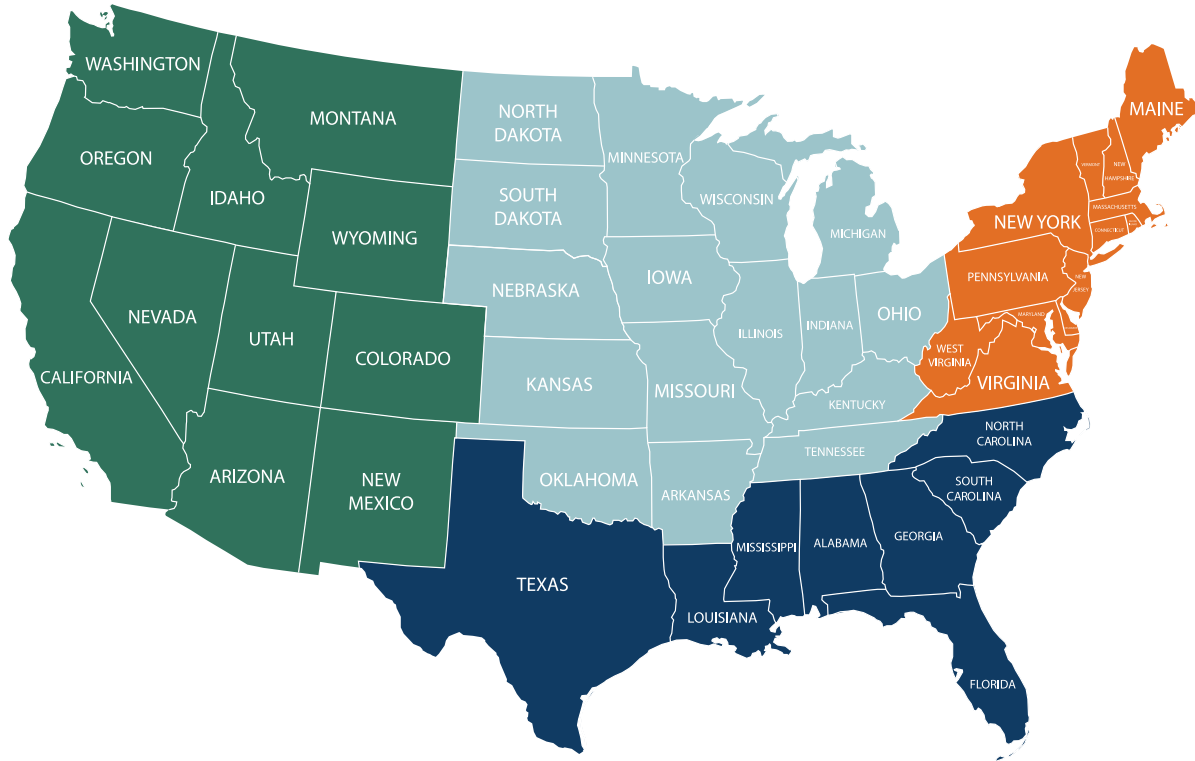


Julian Zugazagoitia
*Director & CEO, Nelson-Atkins
Museum of Art
(Kansas City, MO)*

Attendees

Museum executives were invited from all geographies, disciplines, and institution type.

Total attendees: 76 museum professionals



ATTENDEE GEOGRAPHIC REPRESENTATION

Region	Count
South	20
West	19
Northeast	19
Midwest	18
Grand Total	76



Resources and Recordings

Literature Review and recordings of general sessions can be accessed with the QR code.

SMALL GROUP DISCUSSIONS

To promote peer-to-peer learning, attendees participated in five breakout discussion sessions about the following broad areas: 1) institutional resilience; 2) public funding; 3) socioeconomics and politics; 4) revenue models; 5) boards, labor relations, professional development, and hiring for DEIA. The goals for these discussions were to:

- Expand attendee and IMLS' understanding of a given area of focus through open discussion and note capture by staff.
- Provide the opportunity for participants get to know each other's work within each given area of focus.
- Provide opportunities for attendees to respond to keynote or plenary session topics.
- Encourage new conversations and networking opportunities for museum staff.

The format of Day 1 discussions was to present an open-ended question to each respective small group and allow for attendee comments to direct the discussion with limited facilitation provided by IMLS staff. Day 2 discussions offered a more structured opportunity for group brainstorming by asking each group to conduct a strengths, weaknesses, opportunities, and threats analysis of an area of focus.

Activity 1

Table Discussion Question: Describe the most pressing challenge or need at your organization to be resilient.

The first breakout discussion invited attendees to introduce themselves and describe their most pressing organizational-level challenge or need they were facing to be resilient. Attendees were encouraged to share their own interpretation of resilience, both in reaction to the keynote presentation and in reflection of changes brought about as a result of the pandemic. Attendees were assigned to specific tables to ensure diverse representation of different types of museum disciplines, locations, and organizational sizes.

Key takeaways:

Many of the core themes noted below—funding, addressing community needs, organizational change, and workforce models—are not new overall concepts for the museum discipline to resolve. However, their specific context reflects the unique challenges brought about during or because of the pandemic, recent socioeconomic upheavals, and futurecasting about changing preferences of audiences in a digitally leaning society. Major challenges identified were:

- Solving the evergreen need for new and sustainable funding, revenue, and development models with specific foci on the changing preferences of funders over time while also determining to what extent pandemic-related practices will be sustainable as health-related policies sunset.
- Addressing evolving community wants and cultural tensions, especially as many museums consider implementing changes that may trigger strong responses from different socioeconomic groups.
- Balancing response to calls for organizational change with support for ongoing basic functions, such as collections management and program development, within the context of a given type of discipline or institutional structure.
- Updating workforce models to reflect the changing preferences of employees and volunteers, including the particular challenges of hiring new or rehiring staff after pandemic-related layoffs.

Activity 2

Small Group Discussion Question: Identify areas where the field would want IMLS to invest in a greater focus for research and grantmaking as it relates to available sources of public funding at the local/county/state level.

For this activity, attendees were broken out roughly by four geographic regions in the United States—West, Midwest, South, and Northeast—with the aim of understanding if, and to what extent, location influenced varying levels of public funding opportunities available to a given museum. Within each session attendees were asked to individually identify sources of public funding at the local, county, and state levels, then compile those sources to provide a fuller picture of regional funding and share opportunities with other colleagues in the group.

Key takeaways

Overall, state funding accounted for the most-noted public funding source available, followed by local and county funds regardless of geography (ignoring private or federal funding sources). However, Western states identified about twice as many public funding sources than the rest of their peers, particularly those located along the Pacific Coast. Southern states tended to identify the least amount of public funding sources and the notes from staff suggested this is largely due to limited state or local political support for public financing of the arts and humanities. While these findings are not necessarily representative of national distribution, they tend to align with state-level political leadership preferences. Regardless of location, the aggregate notes from the discussions indicated a wide diversity in funding sources available. For instance, museums indicated COVID-19 relief funds were received at the federal, state, county, and municipal levels. Tax-based funding structures were also identified within all types of governance structure (e.g., city, county, state) with taxing authority.

These findings give IMLS a baseline understanding of what, where, and how public funding is available and distributed to the museum field across the United States. The information is useful as it reviews its own annual granting structures and considers opportunities to further support the museum field financially. Most significantly it reinforced that museums' funding structures are as unique as their missions and that a national model for "best funding models" may be a less useful asset for museums at the national level than, for instance, leveraging partnerships with other public funders, providing technical assistance for grant writing, or fundraising strategies.



Activity 3

Small Group Discussion Question: Identify areas where the field would want IMLS to invest in a greater focus for research and grantmaking as it relates to the socioeconomic and/or political factors that prevent you from addressing funding needs.

These discussions were organized by the same four geographic regions in the United States: West, Midwest, South, and Northeast. These sessions sought to explore and understand the extent to which local dynamics influence socioeconomic conditions museums must respond to. Participants were asked to consider their organization's greatest organizational needs and barriers to securing funding to address these needs within their local contexts. Participants then shared similarities and differences with peers within the same region.

Key takeaways

The conversations and related notes for this session did not result in any specific insights by geography with one exception. Like the results of the prior activity, the state and local political factors largely influenced the capacity of a museum to address socioeconomic needs. Among the greatest needs museums identified for IMLS to consider with future grantmaking and research opportunities, funding was the most important need. However, attendees also expressed a need for support in identifying the best ways to serve their communities and update their service models. As an example, museums identified the opportunities and challenges brought about when responding to request for repatriation of artifacts, where the action itself is of high value, but creates a collections gap.

The obstacles identified by attendees for IMLS as it considers future grantmaking and research opportunities largely reflected the very immediate challenges brought about by legislative or policy changes specifically related to diversity, equity, inclusion, and accessibility (DEIA) topics. Some museum leaders noted the impact of policy changes made by a public entity (local or state government) that contradicts a museum's mission or practice. In some instances, museums experienced a direct conflict between what a community is asking of them and what they are legally allowed to do with the public funds they received.

These comments provide valuable insights into what may influence the focus of grant applications in the coming years and inform future research on how these dynamics may affect the core missions and practice of the museum field at large.



Activity 4

SWOT Analysis Question: What is your organization’s revenue model/structure and what are its strengths, weaknesses, opportunities, and threats? What does financial resilience mean to you? How do you do long-term budget planning?

In this session, the small group discussions were broken out by museum disciplines based roughly on attendee representation: art, history museum or historic site, science-focused museums, children’s museums, zoos, and aquariums and gardens with the overall intent of understanding if and to what extent the varying disciplines led to different SWOT outcomes.

Key takeaways

The SWOT outcomes identified by individuals and aggregated upwards had very similar outcomes across strengths, weaknesses, opportunities, and threats, regardless of discipline. Most interestingly, many of the themes were identical regardless of category. For example, changes in leadership, specifically with boards, were considered a strength by some and a weakness by others.

Top 4 Core Themes Across Groups by Category

Strengths	Weaknesses	Opportunities	Threats
Funding/Development/ Revenue/Endowment	Responding to post-pandemic workforce changes	Funding/Development/ Endowment/Revenue	Funding/Development/ Endowment/Revenue
Responding to post-pandemic operational needs	Funding/Development/ Endowment/Revenue	Sustaining or Development Partnerships	Reputation of Museum/ Community Engagement
Reputation of Museum/ Community Engagement	Responding to post-pandemic operational needs	Reputation of Museum/ Community Engagement	Responding to post-pandemic operational needs
Changes in leadership (board or staff)	Changes in leadership (board or staff)	Responding to post-pandemic operational needs	Responding to post-pandemic workforce changes



Activity 5

SWOT Analysis Question: What does your organization’s approach to workforce issues look like and what are its strengths, weaknesses, opportunities, and threats?

The last of the small group discussions allowed for attendees to choose one of four topics in which to conduct a SWOT analysis: Boards, Labor Relations, Professional Development, and Hiring for DEIA. The goal of this structure was to engage in broad knowledge sharing, regardless of discipline, on tactics and strategies across broad workforce issues.

Key takeaways

Similar to the prior SWOT activity, many of the same common categories emerged with a very similar pattern. The culture of the workplace was nearly universally cited in all four SWOT areas, indicating the power of boards or staffing in the success or failure on a given organizational decision. For the board topic, the make-up of the board members was cited as a strength, weakness, opportunity, and threat. For labor relations, the unique need to resolve the shift of remote work was specifically cited as a threat to successfully updating policies. Lastly, finances were identified as both weaknesses and opportunities when museums sought to support professional development. And while culture and staffing changes were noted in all four categories, the role of government or legal issues was uniquely listed as a threat when it came to hiring for DEIA.

Common Themes Across Categories

	Strengths	Weaknesses	Opportunities	Threats
Board	Culture & Composition	Culture & Composition	Culture & Composition	Culture & Composition
Labor Relations	Culture & Finances	Culture & Finances	Culture & Staffing	Culture & resolving remote work policies
Professional Development	Community & Culture	Culture & Finances	Culture & Finances	Finances & Meeting Staffing Needs
DEIA	Culture & Staffing	Culture	Staffing & Community	Culture & Government



CONCLUSION & NEXT STEPS

As a result of the rich outputs and feedback from this convening, IMLS is charting an action plan for the future to better prioritize its role as a leader and investor in the museum field. The outcomes of the small group discussions made clear that there are emerging effective practices across all of the topics explored during the convening, and that **knowledge sharing across siloes—geographic, discipline, and museum size**—will be a critical practice for ensuring the health and vigor of the field. To this end, IMLS will be focusing on the following actions to extend the learnings from this event:

- Pursue continued opportunities for convening and field dialogue, with an emphasis on
 - » Representing the diversity of the museum field
 - » Centering museum professionals' lived experience and expertise
 - » Focus on identifying effective practices for adaptation and inspiration
- Prioritize investments in workforce development including development of strong recruitment and retention practices; resources for new models of effective governance; and innovative strategies for organizational design.
- Development of a museum research agenda to guide internal agency investments to inform policy and agency practice, and provide focus for external researchers for alignment around field advancement.
- Better articulate and communicate IMLS' role in the landscape of museum funding, to promote access to IMLS funding for more museums and encourage partnership in the larger philanthropic landscape.

IMLS is grateful to all of the invited speakers, museum leaders, and field supporters from across the country for the generosity of mind and spirit they brought to this convening. Their openness, collegiality, and wisdom laid the foundation for the success of this event and events to come.



APPENDIX A—CONVENING AGENDA

IMLS Convening: Museum Leadership in Dynamic Times

March 2–3, 2023

National Press Club

529 14th St NW, 13th Floor

Washington, DC 20045

Thursday, March 2

Time	Activities	Presenter(s)	Location
8:00 a.m.	Registration Open for Check-in		Ballroom Foyer
8:30 a.m.	Opening and Welcome	Laura Huerta Migus, Deputy Director, OMS	Ballroom
9:00 a.m.	Opening Keynote: “The Importance of the Arts and Humanities to Resilience”	Crosby Kemper, III, IMLS Director Adam Kirsch, Editor, Wall Street Journal	Ballroom
10:00 a.m.	Break	Emcee: Helen Wechsler, Senior Program Officer, OMS	
10:30 a.m.	Interactive Discussions at Tables	Emcee: Mark Isaksen, Senior Program Officer, OMS	Ballroom
11:00 a.m.	Keynote Session: “What Does the Data Tell us About Our Present and Future?”	Moderator: Crosby Kemper, III, IMLS Director Panelists: <ul style="list-style-type: none"> • Zannie Voss, PhD, Director, SMUDataArts • Peter Linett, Co-Founder, Slover Linett 	Ballroom
12:00 p.m.	Lunch		Ballroom
1:00 p.m.		Presenters: <ul style="list-style-type: none"> • Laura Huerta Migus, Deputy Director, OMS • Helen Wechsler, Senior Program Officer, OMS 	Ballroom
1:30 p.m.	Group Activities		Breakout Rooms

Time	Activities	Presenter(s)	Location
2:15 p.m.	Break		
2:30 p.m.		<p>Introduction: Mark Isaksen, Senior Program Officer, OMS</p> <p>Moderator: Cyndee Landrum, Deputy Director, OLS</p> <ul style="list-style-type: none"> • Terri Freeman, Executive Director, Reginald Lewis Museum • Lori Fogarty, CEO, Oakland Museum of California • Julian Zugazagoitia, CEO, Nelson-Atkins Museum of Art 	Ballroom
3:15 p.m.	Small Group Discussions		Breakout Rooms
4:00 p.m.	Closing	Crosby Kemper, III, IMLS Director	Ballroom
4:30 p.m.	Adjourn	Laura Huerta Migus, Deputy Director, OMS	
5:00 p.m.	Optional Activity: Guided Tour at Smithsonian American Art Museum		

Friday, March 3

Time	Activities	Presenter(s)	Location
8:00 a.m.	Breakfast/Networking		Ballroom Foyer
8:30 a.m.	Welcome and Introduction to the President's Committee on the Arts and the Humanities	<p>Emcee: Helen Wechsler, Senior Program Officer, OMS</p> <p>Presenters:</p> <ul style="list-style-type: none"> • Crosby Kemper, III, IMLS Director • Tsione Wolde-Michael, Executive Director, President's Committee on the Arts and the Humanities 	Ballroom
9:00 a.m.	Plenary Discussion: "Exploring Sustainability"	<p>Introduction: Mark Isaksen, Senior Program Officer, OMS</p> <p>Moderator: Anne Radice, Senior Advisor, IMLS</p> <p>Panelists:</p> <ul style="list-style-type: none"> • Kirsten Ellenbogen, Great Lakes Science Center • Magdalena Garcia, El Museo Latino 	Ballroom
10:00 a.m.	Group Activity		Breakout Rooms
10:45 a.m.	Break		
11:15 a.m.	Group Activity		Breakout Rooms
11:45 a.m.	Lunch		Ballroom
12:45 p.m.	Closing Plenary and Remarks	<p>Presenters:</p> <ul style="list-style-type: none"> • Crosby Kemper, III, IMLS Director • Laura Huerta Migus, Deputy Director, OMS 	Ballroom
1:30 p.m.	Adjourn		

APPENDIX B—LIST OF PARTICIPANTS

First Name	Last Name	Organization
Melanie	Adams	Smithsonian Anacostia Community Museum
Arthur	Affleck	Association of Children's Museums
Dina	Bennett	American Jazz Museum
Joy	Bivins	Schomburg Center for Research in Black Culture
Crystal	Bowyer	National Children's Museum
Ann	Burroughs	Japanese American National Museum
Evita	Busa	Museo de Arte Contemporáneo de Puerto Rico
Jason	Busch	American Folk Art Museum
Sheila	Cawley	Museum of Science and Industry
Carole	Charnow	Boston Children's Museum
Gabriela	Chavarría	Burke Museum of Natural History and Culture
Dixie	Clough	Museums Alaska
Vedet	Coleman-Robinson	Association of African American Museums (AAAM)
Kathryn	Curran	Robert David Lion Gardiner Foundation
Robert	Davis	America's Black Holocaust Museum
Thomas	Denberg	Shelburne Museum
Karl	Duncan	Poeh Cultural Center
Tanya	Durand	Greentrike
Omar	Eaton-Martínez	National Trust for Historic Preservation
Gerard	Eisterhold	Great Lakes Science Center
Kirsten	Ellenbogen	Great Lakes Science Center
Kaywin	Feldman	National Gallery of Art
Maria Esther	Fernandez	The Cheech Marin Center for Chicano Art &
Andy	Finch	Association of Art Museum Directors
Lori	Fogarty	Oakland Museum of California
Karen	Frazier	American Institutes for Research
Terri	Freeman	Reginald F. Lewis Museum
Benjamin	Garcia	The American LGBTQ+ Museum
Magdalena	Garcia	El Museo Latino
Cecilia	Garibay	Garibay Group
Sarah	Gould	Mexican American Civil Rights Institute
Christian	Greer	Michigan Science Center
William	Harris	Space Center Houston
Anthea M.	Hartig	National Museum of American History, Smithsonian
Cheryl	Hartup	Museo de Arte de Ponce
Joe	Hastings	Explora Science Center & Children's Museum
Debra	Hess Norris	Univeristy of Delaware
Nik	Honeysett	Balboa Park Online Collaborative
Patty	Isacson Sabee	Planet Word

First Name	Last Name	Organization
Jennifer	Jones	Minnesota Historical Society
Daniel	Keeffe	Los Angeles Zoo and Botanical Gardens
Guillaume	Kientz	Hispanic Society Museum & Library
Adam	Kirsch	Wall Street Journal
Cameron	Kitchin	Cincinnati Art Museum
Lisa	Lee	National Public Housing Museum
Peter	Linett	Slover Linett Audience Research Inc.
Laura	Lott	American Alliance of Museums
Robert	Luckett	Margaret Walker Center
Jonh	Marks	American Association for State and Local History
Noel Bella	Merriam	National Hispanic Cultural Center
Elizabeth	Merritt	American Alliance of Museums
Lorie	Millward	Thanksgiving Point Institute
Dené	Mosier	Kansas Children's Discovery Center
Christofer	Nelson	Association of Science and Technology Centers (ASTC)
Rick	Noguchi	Japanese American National Museum
Tey Marianna	Nunn	Smithsonian Institution
Drew	Oberjuerge	Riverside Art Museum(including The Cheech Marin Center for Chicano Art and Culture)
Christina	Olsen	University of Michigan Museum of Art
Micah	Parzen	Museum of Us
Allison	Perkins	Reynolda House Museum of American Art
Rashida	Phillips	American Jazz Museum
Judith	Pineiro	AAMC & AAMC Foundation
Monica	Ramirez-Montagut	The Parrish Art Museum
Lourdes	Ramos	Museum of Latin American Art
Tim	Ritchie	Museum of Science
Bertha	Rodriguez	The Mexican Museum
Maria	Rodriguez	Vanguard Communications
Megan	Ross	Lincoln Park Zoo
Morteza	Sajadian	amazement square
Lisa	Sasaki	Smithsonian American Women's History Museum
Kenneth	Schutz	Desert Botanical Garden
Elizabeth	Silkes	International Coalition of Sites of Conscience
Adalene	Spivy	Northern Virginia Science Center Foundation
Auntaneshia	Staveloz	National Museum of African American History and Culture
Stephanie	Stebich	Smithsonian American Art Museum
Beth	Takekawa	Wing Luke Museum (retired)
Joël	Tan	Wing Luke Museum of the Asian Pacific American Experience
Belinda	Tate	Kalamazoo Institute of Arts
Noelle	Trent	National Civil Rights Museum

First Name	Last Name	Organization
Ximena	Varela	American University
Zannie	Voss	SMU DataArts
Andrew	Walker	Amon Carter Museum of American Art
Shoshana	Wasserman	First Americans Museum
Dana	Whitelaw	High Desert Museum
Karol	Wight	Corning Museum of Glass
Tsione	Wolde-Michael	PCAH
Steven	Wong	Vincent Price Art Museum
Elee	Wood	The Huntington Library, Art Museum, and Botanical Gardens
Julian	Zugazagoitia	Nelson-Atkins Museum of Art