



Museum Grants for African American History and Culture

Sample Application MH-00-19-0036-19
“Leadership Ladders: Professional Development Initiative”

The Studio Museum in Harlem New York, NY

Amount awarded by IMLS:	\$248,160
Amount of cost share:	\$314,224

Attached are the following components excerpted from the original application.

- Abstract
- Narrative
- Schedule of Completion

Please note that the instructions for preparing applications for the FY2020 Museum Grants for African American History and Culture grant program differ from those that guided the preparation of FY2019 applications. Be sure to use the instructions in the [FY2020 Notice of Funding Opportunity](#) for the grant program to which you are applying.

The Studio Museum in Harlem requests a grant of \$248,160 to support *Leadership Ladders* a three-year professional development initiative (July 2019 – June 2022) to prepare and train a significantly expanded Museum staff who will be responsible for leading, managing and implementing the Museum's new state-of-the-art facility, programmatic content, and overall structure beginning in 2022. This aligns with the Museum's strategic capacity-building commitment to significantly enhancing the capabilities of the Museum's management and staff, while also building the innovative and explicit mechanisms for bold and engaging professional development and succession planning on an on-going basis. To achieve this strategic vision, Museum leadership proposes to bolster our Human Resources department and develop a comprehensive program to train and develop Museum staff leaders across all organizational areas as we look to grow from an annual \$7M budget in 2018 to an approximate \$12M by 2022 when we re-open in the Museum's new facility. This will include a doubling of the Museum staff from 50 employees to approximately 100 employees, as well as the promotion of a number of current staff members into newly created director roles.

The Museum recently engaged with Amy Kaufman/AK Cultural Planning to determine the Museum's level of maturation in preparation for inhabiting its new building, and encompassing projected growth trajectories for programming, facilities, and industry position in the field. After their assessment, it was concluded that the Museum: *Revise staff configuration* for enhanced oversight and integration of programming; *Increase staff professional development* to develop skills, strategy, management; *Develop staff systems* including program calendar development, evaluation, collaboration and team alignment, and departmental accountability.

In direct response to these findings, the goal of this professional development initiative is to comprehensively enhance staff and organizational capacity and structure that reflects the breadth and international importance of the new Studio Museum in Harlem. This will be accomplished through the promotion, hiring, and multi-faceted training of an informed and prepared Museum staff; and the hiring of a new Senior Human Resources Generalist Learning and Organization Development. This new staff member will be responsible for creating and implementing a new organizational culture that includes staff leadership, training, performance, recognition, and overall professional accomplishment.

Professional Development programming will include: *Leadership Training* including executive coaching, attendance at institutes and workshops; *Technical Training* specific to Museum departments that require specialized focus, including Information Technology, Facility Operations/Management, Finance and Budgeting, and Earned Revenue; *Broad-based Professional Development* that will be shared institutionally and across aligned departments, e.g. writing and communications training for internal and external audiences.

All professional development training initiatives and outcomes will be documented to ensure that the approach to this program is a permanent part of institutional planning and a central part of standard operating procedures for the effective training of current and future staff leaders and members across departments and programs. In addition, the Museum will share key findings and best practices learned through this program at all staffing and organizational levels with peers throughout the United States and across the globe via the Museum's significant professional network both in the museum field and across disciplines and interests.

PROJECT JUSTIFICATION

The Studio Museum in Harlem requests a grant of \$248,160 to support *Leadership Ladders* a three-year professional development initiative (July 2019 – June 2022) to prepare and train a significantly expanded Museum staff who will be responsible for leading, managing and implementing the Museum’s new state-of-the-art facility, programmatic content, and overall structure beginning in 2022. This aligns with the Museum’s strategic capacity-building commitment to significantly enhancing the capabilities of the Museum’s management and staff, while also building the innovative and explicit mechanisms for bold and engaging professional development and succession planning on an on-going basis.

To achieve this strategic vision, Museum leadership proposes to bolster our Human Resources department and develop a comprehensive program to train and develop Museum staff leaders across all organizational areas as we look to grow from an annual \$7M budget in 2018—when we closed the doors of our current facility—to an approximate \$12M by 2022 when we re-open in the Museum’s new facility. This will include a doubling of the Museum staff from 50 employees to approximately 100 employees, as well as the promotion of a number of current staff members into newly created director roles, all of which will be implemented during this three year program period.

Leadership Ladders builds on the significant professional development progress that the Museum has accomplished over the past decade, beginning in 2008 with an IMLS-funded Museum program entitled Stepping Stones. Via Stepping Stones, the Museum worked with consultant Booz Allen Hamilton to conduct a comprehensive staff survey through which the Museum learned of the significant and multi-varied needs of staff for more support in their roles as managers, and in the context of being given greater responsibility without adequate training or acknowledgement.

In 2015, the Museum secured a second IMLS grant for professional development to implement its Building Blocks program. This program incorporated lessons learned directly from the Booz Allen Hamilton survey, in particular, the challenges most significantly felt by middle-management Museum staff with excellent knowledge of their field, but little formal leadership and professional development experience. Grant funds were used to formalize staff development focusing on managers at the mid-level path, providing strong support systems, protocol and a dynamic training mechanism for this growing career track at the Museum. This included adding three staff new staff positions i.e., Manager of Programs and Community Engagement, a School Coordinator, and a Family Program Coordinator, as well as a template for a sustainable training curriculum.

Through Building Blocks, the organization hired a Human Resources Generalist and also adopted a Human Resources mission statement including a commitment to: *identify potential leaders, develop best professional practices and foster a collaborative, trusting and learning community of professionals who are committed to advancing the Museum’s mission*. This statement continues to inform the Museum’s current approach to professional development, institutional capacity, and staff retention which includes a program of internal professional development workshops and “brown bag” lunch talks; attendance at industry conferences, panels and events; networking opportunities with a specific focus on leaders and managers of color; and individualized professional development opportunities for staff members that are directly aligned with staff promotion and new responsibilities. This is directly in keeping with the Museum’s overall mission to level the playing field for people of color in the arts community, whether they are artists or administrators, providing opportunities for growth both within and beyond the Museum’s walls. Even given this concentrated focus on professional development, at this time of extreme growth during the Museum’s building phase, leadership understands that the Museum must fortify

its organizational capacity in a variety of capacity dimensions with a focus on organizational structure, human resources, and operating policies and procedures.

During this past year, the Museum engaged with Amy Kaufman/AK Cultural Planning to determine the Museum's level of maturation in preparation for inhabiting its new building, and encompassing projected growth trajectories for programming, facilities, and industry position in the visual arts and museum fields. After AK Cultural Planning's 6-month assessment, it was concluded that: 1) the current Museum staff size of 52 full-time and 21 part-time members is already "compressed" relative to national AAMD peers, and 2) the majority of the dedicated and hard-working Museum staff members in place, 78% of whom are individuals of color, require professional development at a variety of levels. Notably, museum and arts professionals of color remain a historically underrepresented group within the leadership and senior staff structures of non-profit entities, both in and outside of the arts, nation-wide.

In particular, findings related to the Museum's organizational maturation include the following: *Staff Configuration* to drive the growth that will accommodate the Museum's new building (and into the next decade) include: enhanced oversight and integration of programming areas and staff, establishing Visitor Experience as a key area, and elevation of Human Resources to support institutional strategy; *Transition* from "project culture" to "operating culture"; *Staff Professional Development* including increased skills in conceptualizing work strategy, managing up/down/across the organization, and collaborating effectively and efficiently with colleagues for maximum output; *Staff Systems* including the development of a long-lead institutional calendar, integrated departmental and organizational reporting, and consistent metrics and evaluation protocol; *Collaboration and Team Alignment*; and *Departmental Accountability*.

In direct response to these findings, the goal of this next proposed professional development initiative for which IMLS funding is requested is to comprehensively enhance staff and organizational capacity and structure that reflects the breadth and international importance of the new Studio Museum in Harlem. This will be accomplished through the promotion, hiring, and multi-faceted training of an informed and prepared Museum staff that is committed to the Museum's core Human Resources values of *leadership*, *collaboration*, and *learning*. A central component of this approach will be the hiring of a new Senior Human Resources Generalist Learning and Organization Development during Year One of this three-year program. This new staff member will be responsible for creating and implementing a new organizational culture that includes staff leadership, training, performance, recognition, and overall professional accomplishment.

The Museum understands that it is through empowered leaders and an engaged staff that the Museum will most effectively steward in the next phase in the organization's development as THE global museum center for African American artists and artists of African descent. With the hiring of a new Senior Human Resources Generalist, our equitable approach to professional development across the Museum's many departments and overall culture will be significantly strengthened and cohered. This will help to ensure that newly developed staff will be adept in the skills required to both manage and maintain this new facility, while also welcoming the innovations and progress that new technology mandates. Accomplishing this will ready the way for staff members to engage fully and over the long-term in the Museum's formalized identity as a premier American museum offering the deep and well-articulated visitor experience that this new building and content will command.

Notably, the Studio Museum is celebrating its 50th anniversary while also having launched a multi-million dollar construction phase to build the new Studio Museum for the 21st century earlier this year. It is essential that we secure our work by nurturing our own future leadership, training and retaining an expanded staff of Museum

professionals across backgrounds and generations, creating a culture of human resources equity, accountability, and empowerment. It is also vital that we document our approach so that we may concretize our progress while also supporting the efforts of other like-minded institutions who share our commitment to advancing the careers of museum leaders and professionals of color. The Studio Museum in Harlem has informally taken a leadership role in diversifying the pipeline of museum leaders of color across the U.S., and around the globe through our hiring, professional development, and curatorial practices to date, a portion of which has been accomplished with the generous support of IMLS.

PROJECT WORK PLAN

To achieve the *Leadership Ladders* professional development initiative, the Museum intends to implement the following primary program objectives:

- Hiring a Senior Human Resources Specialist, Learning and Organization Development, a new, permanent staff member who will create and manage a new organizational culture framework encompassing staff performance, learning, and training and including a focus on staff recognition, achievement, and professional satisfaction.
- Professional Development programming including:
 - Leadership Training including executive coaching, attendance at institutes and workshops, professional mentoring, and field-based networking opportunities for current staff being promoted into director-level positions, as well as new Museum managers and associates/assistants within the expanded organizational structure.
 - Technical training specific to Museum departments that require specialized focus, including and not limited to: Information Technology, including training staff in new Museum smart building technology, technology safety, and internet security; Facility Operations/Management pertaining to the expanded and enhanced exhibition galleries, education workspaces, and Artist-in-Residence studios; Finance and Budget; and Earned Revenue (including content dissemination, events, and the Museum Shop).
 - Broad-based Professional Development that will be shared institutionally and across aligned departments, e.g. writing and communications training for internal and external audiences, Visitors Experience, etc.;
- Documenting policies and procedures integral to project benchmarks and overall organizational goals;
- Institutionalizing documented procedures in Museum strategic planning and Human Resource functions, including the full implementation of training programs in all departmental standard operating procedures.

In particular, grant funds will support the following *Sequence of Grant Activities in Years 1-3*:

Year One (July 2019 – June 2020)

- Hiring a permanent, full-time Senior Human Resources Generalist, Learning and Organization Development reporting to the Deputy Director of Finance and Operations and working in tandem with the current Human Resources Generalist. This new Senior HR Generalist will implement the IMLS-funded professional development program, specifically focusing on a culture of learning, performance, and professional development. The Museum will retain the current Senior Human Resources Generalist, Personnel, who will continue to manage onboarding, employee administration, payroll, and related duties. Deputy Director and Program Manager Sheila McDaniel will begin to move away from daily duties related to Finance and Operations to start focusing on Legal and Compliance in preparation for and through the opening of the new building.

- Hiring consultant Amy Kaufman/AK Cultural Planning who will work with the new Senior Human Resources Generalist on creating and implementing a structured performance review process, and aid in the development and implementation of evaluation tools. AK Cultural Planning brings 25 years of experience in progressive, “next generation” approaches, in part, to implement scenario planning and iterative analyses to right-size operations; integrate findings from multidisciplinary teams; and support successful execution through staff collaboration and knowledge transfer.

Years One – Three (July 2019 – June 2022)

- On-going training of individual employees and departmental teams within the new organization staff structure is being implemented as of fall 2018 and continuing as new staff members are hired and trained throughout the grant period. Toward this end, the Museum has recently begun implementing this new staff structure to ensure that a more equitable and efficient reporting structure is in place. In summer 2018, the Director of Institutional Advancement was promoted to Deputy Director, resulting in a three-person executive staff that now includes Director and Chief Curator Thelma Golden Deputy Director Sheila McDaniel and Deputy Director Hallie Hobson. In addition, four senior level employees have been promoted to Director positions, with department Managers and Coordinators reporting to Directors. Additionally, and Associates and Assistants now report to department Managers.

As this new structure evolves, leadership training will be implemented for the following new Director level positions which have recently been put into place: Director of Education; Director of Public Programs and Community Engagement; Associate Curator, Collections; Associate Curator, Exhibitions; Director of Finance and Human Resources; Director of Visitor Services; and the Director of Development. Additionally, grant funds will support professional development for Associate-level Managers including the Manager of Education; Exhibitions Manager; Major Gifts Officer; Associate Director of Development, Database and Operations; and Manager of Finance. In addition, Deputy Directors will participate in leadership networking and peer conferences on an on-going basis. With the aid of AK Cultural Planning, evaluation tools/documentation will be developed in year one, revisions will take place in year two, and a final system for gathering, assessing, and dissemination will be complete by year three.

Leadership training examples and participants:

The Getty Leadership Institute Executive Education for Museum Leaders: the Director of Education, Director of Public Programs and Community Engagement, and Associate Curator, Collections will each participate in this immersive program that will help them gain an in-depth knowledge on how to develop an effective leadership style and develop tools to solve complex organizational challenges. With a week-long online portion in May and 16 day extensive residency program in June, participants will walk away with an invaluable leadership assessments and development courses enhanced by simulations, self-assessments, feedback reports, and step by step action coaching.

Executive Program for Nonprofit Leaders at Stanford Graduate School of Business: the Director of Finance and Human Resources and the Director of Development will attend this six-day intensive program to strengthen their leadership abilities, and create a plan of action in order to address organizational and strategic planning. With invaluable lectures, discussion and exercises led by Stanford faculty this program we expect that it will impact how they support Studio Museum’s mission and resolve challenges.

Technical training examples and participants:

Director-level staff will participate in conferences that are specific to their area. The Director of Communications will attend the National Arts Marketing Project Conference that brings together arts marketers from across the country to participate on panel talks and workshops that aim to share new technologies and innovations to develop better marketers. The Associate Curator, Exhibitions will attend the Association of Art Museum Curators Annual Conference and Meeting, to participate in mentorship opportunities, professional development workshops, as well as network and attend panels. Both Associate Curators will also attend the Association of African American Museums Conference to network with fellow black museum professionals, advocate, collaborate, and advance the field. The Visitor and Retail Services Director will participate in the Museum Store Association Nonprofit Retail Certificate Program to boost management of the business- and customer relations-side of her work, including developing a business plan, communications, operations, and strategic management. The Education Manager and Education associates will attend the National Art Education Association Convention annually, participating in workshops and events specific to their area (school, youth, families). IT Director and Building and Operations Director will both have trainings on operating the new smart building that are offered by the systems we implement (that are still being determined and not part of this request). Annual IMLS conferences will allow directors and managers the opportunity to learn about developments in the field and is a great occasion to network with peers nationally.

Broad-based professional development:

Manager- and associate-level positions will be offered professional development that strengthens their job-specific skill-set, and aids in the development of their future leadership. Weltchek Writes will offer a cross-department series of workshops that will aid Studio Museum staff in director, manager, and associate roles with their writing, editing, and communication skills. At this moment of great institutional change, it is critical to sustain a unified institutional voice. Other workshops will be offered in-house that include technology, visitor service, and external affairs trainings.

Project Risks: Efficient timing and on-going implementation of this professional development initiative across management levels and departments will be key to this program's success. That said, Museum leadership understands the challenges with a large-scale, multi-million dollar, multi-year building project including the need to remain flexible in the face of shifting timeframes, budget considerations, and staff attrition. The project team will meet monthly to ensure efficient management and delivery of professional development programming, and will work collaboratively to manage challenges that emerge throughout the implementation period.

Project Team: To ensure a rigorous and dynamic program, Museum Deputy Director Sheila McDaniel will lead this professional development initiative with full participation of the new Senior HR Generalist Learning and Organization Development, who will serve as program implementor, the Senior HR Generalist, Personnel, and AK Cultural Planning who will advise, guide, and develop a system of evaluation for this program. These individuals will comprise the Program Team. Significant assistance will be provided by the Museum Finance and Operations team including the Director of Finance and Operations who directly manages the Human Resources department. Museum directors will be responsible for implementing team and individual staff member training within their respective departments and in encouraging cross-department collaboration and assessment.

Sheila McDaniel joined The Studio Museum in Harlem as the Deputy Director, Finance and Operations in August of 2004. At the Studio Museum, Sheila is a member of the leadership team responsible for the implementation of the Museum's strategic plan. In that role, she has introduced policies and procedures insuring best practices and

exemplary organizational performance. Her areas of expertise include change management, human resource development, nonprofit financial management and organizational development.

The Senior Human Resources Generalist, Learning and Organization Development (TBD) will be responsible for crafting a human resources culture of learning, performance, and professional development. Within this scope, this new staff member will be responsible for learning and training both at the individual and team levels, performance review, overall organizational development, inter-departmental collaboration, staff events/bonding, and a structure for staff rewards and recognition.

Amy Kaufman/AK Cultural Planning has over two decades of demonstrated success in market research, organizational strategy, business and facilities planning, branding, and operational implementation. Kaufman has worked with institutions of all types and sizes, including museums, universities, parks, botanic gardens, visitor centers and heritage sites. She collaborates with government agencies, architects, developers, foundations, and institutional leaders to integrate a variety of goals and perspectives. Kaufman launched AK Cultural Planning in 2015, building on a 25 year career that includes museum budgeting and operations, market research, project management, and consulting.

Dennell Jones, Senior Human Resources Generalist, Personnel, started at The Studio Museum in Harlem in 2005 as a Temporary Human Resources/Executive Assistant, and has shown great dedication and career growth over the past 13 years. She became a full time employee of the Museum in 2006, in 2011 she was promoted to HR Coordinator, in 2017 she received another promotion to HR Generalist. This past spring she received another advancement to Senior HR Generalist, Personnel. During her time at the Museum she has implemented a formal payroll and personnel platform in ADP as well as coordinating all on-boarding and off-boarding, benefits selection and processing, institutional policy and HR compliance enforcement.

Progress Tracking and Evaluation: McDaniel will meet regularly with the Program Team and with peer executive staff and senior leadership including directors of each department to: 1) Chart professional development progress to date for all staff members and teams, 2) Discuss and determine potential modifications required in specific departments as well as organization-wide, 3) Plan for additional expertise for full program implementation and effectiveness as it relates to relevant needs and challenges as they occur, and 4) All other related issues as appropriate. The Museum team will work with AK Cultural Planning on the development of a performance rubric that will chart the program's success and challenges. Museum directors in close collaboration with the new Senior HR Generalist will be responsible for overall program assessment of both quantitative and qualitative measurements on an on-going basis. This includes documenting individual and departmental achievements toward project goals, staff performance and engagement with organizational culture, adherence to projected timelines, and additional levels of progress and assessment.

Project Dissemination: All professional development training initiatives and outcomes will be documented to ensure that the approach to this program is a permanent part of institutional planning and a central part of standard operating procedures for the effective training of current and future staff leaders and members across departments and programs. In addition, the Museum will share key findings and best practices learned through this program at all staffing and organizational levels with peers throughout the United States and across the globe via the Museum's significant professional network both in the museum field and across disciplines and interests. This will include presentations at some of the in-person and online conferences mentioned above and through publication of select program documentation and evaluation.

PROJECT RESULTS

Leadership Ladders will achieve the following Agency-level Goal - *Build Capacity: IMLS strengthens the capacity of museums and libraries to improve the well-being of their communities*. To ensure that we achieve the intended results, the Program Team, will incorporate IMLS Performance Measurement Standards into surveys of staff and Museum departments at critical points in the program's three-year implementation that measure the impact of the following: 1) the new Senior Human Resources Generalist's approach and work, 2) Leadership and professional development trainings administered throughout the program period, and 3) Overall professional accomplishment and satisfaction of all staff members within the newly invigorated Museum culture. Areas of focus will include the Museum's understanding of its organizational and staff needs and challenges, and its ability to deliver services through effective, sustained program dissemination, as well as the depth of staff participation in and engagement with professional development opportunities, motivation for advancement, and overall Museum culture. The Museum understands the complex and multifaceted scope of a three year program that so heavily relies on the motivation and commitment of staff members for its success. While a certain amount of staff turnover is inevitable at an organization, Museum leadership is confident that this is the prime moment in which to embark on this next phase of investment in the Studio Museum in Harlem's most valued asset: the individuals who enliven the Museum and bring its content to the American public each and every day.

With the successful implementation of *Leadership Ladders*, Museum leadership anticipates significantly increased capacity of professional skills, knowledge, and expertise across departments and throughout the organization. This is directly in keeping with the work the Museum has done to date in shaping a new paradigm for museum leaders, curators, and administrators of color that other cultural institutions are now adopting and benefiting from. We have been heartened by the successes of former Studio Museum alumni who have moved on to curatorial, education, and leadership positions at the Metropolitan Museum of Art, Los Angeles County Museum of Art, California African American Museum, Museum of Modern Art, Whitney Museum of American Art and others. Thus, we are aware of the Museum's unique role as a training ground for the next generation of curators and art leaders of color, as highlighted in an August 2017 *The New York Times* article by Robin Pogrebin, "At Museums, More Minorities on Staff Than on Board":

The Studio Museum has become a veritable farm team of curators for other institutions...Still, Thelma Golden, the director of the Studio Museum, said that part of its mission was developing the expertise of staff members in the work of artists of African-American descent so that they can take that knowledge to other museums.

We fully anticipate that with this next proposed iteration of professional development, and the growth, promotion, and recognition that are integral to this program, staff satisfaction and retention will significantly increase. Given the level of "job hopping" that exists in the non-profit sector due to salary stagnation and the dearth of professional development opportunities for advancement throughout the industry, we are committed to offering the potential for staff members to hone their skills, build their professional networks, and advance their careers through in-depth and sustained professional experiences both within the Studio Museum's organizational structure and throughout the museum and arts fields.

Now is the time for the Museum to codify leadership training and professional development while generating and disseminating vital content and ephemera about black artists. This will directly impact the Studio Museum's offerings to its home community, as well as to museums, educational institutions and organizations throughout the United States and around the world.

Studio Museum <i>Leadership Ladders</i> Schedule Year 1	Jul-19	Aug-19	Sep-19	Oct-19	Nov-19	Dec-19	Jan-20	Feb-20	Mar-20	Apr-20	May-20	Jun-20
Recruit & Hire Sr. HR Generalist, Learning & Org Development												
HUMAN RESOURCES												
Training and Research in existing HR systems												
Sr staff meetings on perform and learn opportunities												
Present recommendations for next 3 years												
Contract Amy Kaufman Cultural Planning												
Team meets AK to discuss performance objectives/goals												
Research & develop new performance review process												
Development of HR&PD evaluation tools												
Program team kick off meeting												
Program team mtgs chart progress & recommendations												
PROFESSIONAL DEVELOPMENT												
IMLS Focus Conference												
Director of Education, Getty Leadership Institute												
Dir Finance&HR, Exec Nonprofit Leaders Stanford Grad School Business												
Assoc. of Art Museum Curators Conference												
National Arts Marketing Project Conference												
Association of African American Museums Conference												
Museum Store Association Certificate online training												
NAEA National Convention												
Weltchek Writes Workshops												
Onsite workshops (subjects/leaders TBD)												
Staff participating in PD document lessons learned												

**Exact dates of professional development TBD, timeline based on recent conference dates