Developing Leadership for Canadian Museums:
Linking Self-Leadership to Community Relevance

by

NAOMI P. GRATTAN

A Thesis Submitted to the Faculty of Social and Applied Sciences
in Partial Fulfilment of the Requirements for the Degree of

MASTER OF ARTS IN LEADERSHIP

Royal Roads University
Victoria, British Columbia, Canada

Supervisor: DR. CATHERINE ETMANSKI
JANUARY 2017

Committee Approval

The members of Naomi Grattan's Thesis Committee certify that they have read the thesis titled

"Developing Leadership for Canadian Museums: Linking Self-Leadership to Community

Relevance" and recommend that it be accepted as fulfilling the thesis requirements for the

Degree of Master of Arts in Leadership:

>Dr. Catherine Etmanski [signature on file]

>Dr. Robert R. Janes [signature on file]

Final approval and acceptance of this thesis is contingent upon submission of the final copy of

the thesis to Royal Roads University. The thesis supervisor confirms to have read this thesis and

recommends that it be accepted as fulfilling the thesis requirements:

>Dr. Catherine Etmanski [signature on file]

Creative Commons Statement

Abstract

In partnership with the Canadian Museums Association (CMA), the question I investigated in this thesis was, "How might the CMA facilitate leadership development among its members?" In its most recent strategic plan, the CMA identified three major challenges facing Canadian museums, two of which were changes to the workforce and the need for more professional development opportunities at every career stage. Canadian museums also face increasing challenges in building connections with, and relevance to, community. Using action research methodology, and specifically an action research engagement model overlaid with an appreciative stance, I interviewed six museum workers from across the country and conducted a focus group with CMA staff. I undertook this work with the approval of the Royal Roads University Ethics Board, and in line with the Royal Roads University Ethics Policy. The key findings of this study explored the link between developing self-leadership among museum workers at all levels and the ability of museums to engage meaningfully and successfully with community. The major recommendations offered actions the CMA could undertake to facilitate leadership development among the membership which could, in turn, lead to the collective strengthening of Canadian museums as vibrant and compelling organizations that draw from our collective past, inquire into our present, and shape our emergent future.

Acknowledgements

I am grateful to my parents for their unfailing love and support throughout my life. I owe my passion for museums to my father who contributed to the work of Canadian museums for 35 years with the Canadian Conservation Institute. He taught me to be curious, to value culture, and to love good writing.

I am also grateful to my wonderful colleagues who have inspired me to bring my best work to this inquiry and to our museums. I am particularly grateful to Dr. Robert R. Janes for his passionate leadership and commitment to making museums matter, and for his review of this paper. Thank you to my supervisor, Dr. Catherine Etmanski, and to my inquiry team: Alexandra Hatcher, Lisa Making, and Crystal Willie for their numerous thoughtful and practical contributions. I thank John McAvity and Audrey Vermette for their support through the Canadian Museums Association.

Last, thank you to Jamie, for arriving just in time.

Table of Contents

Chapter 1: Focus and Framing

Canadian museums and Canadian museum workers are anxious about the future. Dr. Robert R. Janes, Canadian museologist and editor emeritus of *Museum Management and Curatorship*, captured this anxiety in the title of his 2009 book: *Museums in a Troubled World: Renewal, Irrelevance, or Collapse?* To meet the challenge of addressing this anxiety, and to ensure museums become relevant and financially self-sustaining operations, museums need people who have both museum training *and* leadership skills. However, there has not yet been much discussion of leadership in museums generally (Johnson, 2012, p. 77), and even less that is specific to Canada. This inquiry was an effort to engage Canadian museum workers in a conversation about leadership and what it could look like in 21st century museums.

Chapter 1 provides an overview of the inquiry project, beginning with a brief introduction to the sponsoring organization, the Canadian Museums Association (CMA), and my role and interest in the Canadian museums sector. It then states the main research question and sub-questions, followed by a description of the significance of the inquiry to the Canadian museum sector, and a description of the key stakeholders of the inquiry. The remainder of the chapter places the inquiry in context, by describing the CMA itself, situating the inquiry with the CMA, reviewing the state of museums in Canada today, and the chapter concludes with a summary of the imperative for change in Canada's museums.

The CMA is a national, non-profit organization dedicated to "the advancement of Canada's museum community . . . [and] the recognition, growth, and stability of the sector" (Canadian Museums Association, 2014, About the CMA). The CMA is the sponsor organization for this inquiry.

My current role in the CMA is that of both member and supporter. I have worked in and for museums in Canada since 2001, for organizations ranging from a municipal art gallery (the MacLaren Art Centre in Barrie, Ontario) to three of the national crown corporations (Canadian War Museum, Canadian Museum of History, and the National Gallery of Canada), to the CMA itself as Director of communications. I have also spent time working internationally with UNESCO's International Centre for the Preservation and Restoration of Cultural Property in Rome, and for a Vancouver-based museum consulting firm where I managed the work of the interpretive design team on a wildlife park and science centre project in the United Arab Emirates. I have served as a consultant to the Canadian Conservation Institute, the Alberta Museums Association, and Cantos Music Foundation. When Cantos, a private foundation, became a public, non-profit organization and was renamed the National Music Centre in early 2012, I was asked to join the team as Director of operations; a role I occupied until November 2015. At that time, I resumed consulting in museums and culture, and at the time of writing was working on two museum development projects among other related work.

My experience over the past 15 years in the museums sector is broad, and has afforded me the opportunity to build relationships with many people working in many different capacities, all of whom are passionately committed to supporting Canada's 2,500 museums and the CMA in its mission to "preserve our collective memory, shape our national identity, and promote tolerance and understanding" (Canadian Museums Association, 2014, About the CMA).

As a member of the Canadian museums sector, the question I investigated with the support of the CMA was "How might the CMA facilitate leadership development among its members?"

The sub-questions were as follows:

1. What stories of leadership success do members of the CMA tell?

2. What vision do CMA members have for Canadian museums 10 years from now?

3. What kind of leadership do Canadian museums need to realize that vision?

4. How might the CMA develop this leadership in Canada?

These sub-questions served to guide interviews with museum workers across Canada, and were also discussed in a focus group with CMA staff members. The findings from the interviews and the CMA staff focus group were then shared with the CMA's board members.

Significance of the Inquiry

Museums are highly complex organizations, as Janes (2009) noted, "housing multiple professional allegiances, competing values and interests, and a range of diverse activities that would give pause to the most seasoned executive" (p. 57). Many believe there is a leadership crisis building in museums. Writing about the leadership of history museums in the United States, Ackerson and Baldwin (2006) stated that as generational leaders retire it will create an "unprecedented leadership gap" (p. 349) in the sector. Falk and Sheppard (2006) concurred, noting that

> museums are often unable to hire new employees with the mix of skills and backgrounds they need, the aging of the Baby Boom generation threatens many institutions with the imminent retirement of their most knowledgeable employees, yet at the same time, there is a decline in training of existing employees. (p. 236)

In 2007, the Alberta Museums Association created a Leadership Working Group, which defined the coming leadership gap as the "lack of suitable candidates to fill open positions within museums

and a lack of leadership skills necessary to fill these positions" (p. 7). Kotler (2005) confirmed that museum leadership is a pressing issue:

> Directors have shorter tenures and leave their positions on shorter notice. New directors are usually chosen from outside the ranks and have less time for on-the-job learning. Museum boards often recruit with inadequate knowledge of management demands, organizational structure, the impact of museum life-cycles, and the effect of turnover on staff. Upper-management transition has become a key museum issue. (p. 81)

One way to address the issue of management transition is to think about it differently. As Johnson and Roberts (2009) stated, "museums are operating in a climate of change that calls for new ways of thinking about how leaders and followers across the institution take and support initiatives in service of creating value" (p. 8). The vacuum created by the exodus of many of the sector's senior leaders, compounded by the lack of training for current employees and decreasing funding (Langlois, 2013, p. 6), will create both an opportunity and a challenge for those individuals who work in museums and believe in the capacity of museums to contribute to society.

Today, much museum writing addresses the social role of museums; it defines a new relationship for museums and their communities, values participation and inclusivity, and shifts from a focus on objects to ideas (McCall & Gray, 2014, p. 21). However, as Janes (2016) argued, there is little evidence that museums are actually changing their practices and that "the collective perspective of the museum community is dangerously narrow at this point in history" (p. 367). It could be argued that a new museology demands a related rethink about museum workers.

As Svyantek and Brown (2000) explained, for a system itself to change, the behaviour of individuals involved in the system must also change (p. 71). If the Canadian museum sector does

not begin a larger, intentional, discussion about the future, and the necessary leadership aptitudes

and abilities its workers need for that future, then the sector will likely continue to struggle with

decreasing public funding and lack of clarity about purpose. Recent media coverage of this issue

in the United Kingdom reported that "many of Britain's 700 publicly funded regional museums

 . . . are in jeopardy" and that 44 have closed since 2010 (Thorpe, 2016, para. 1). The CMA does

not keep similar statistics for Canadian museums, but as the theme of the 2011 CMA conference

drove home, it is time for the sector to "evolve or die" (Canadian Museums Association, 2014,

About the CMA).

Given the challenging operational realities of museums, it is my hope that this inquiry may

contribute to expanding the discussion about the next generation of museum leadership among

Canadian museum workers. Specifically for the CMA, it is also my hope that by asking members

how the CMA could support leadership development in the sector, the CMA will benefit from

useful input it can use to develop tools or services that members want and need.

Inquiry Stakeholders

The group of stakeholders potentially affected by this inquiry is quite large: it could

comprise everyone working in and around the museum sector in Canada. In an effort to define

and identify those key stakeholders specific to this inquiry, I have used Conner's (2013) terms as

a means of grouping them and understanding their specific roles relative to the inquiry. In his

video explaining his terms, Conner (2013) first defined the sponsor as the "person or group with

the organizational power to sanction the change" (0:30). The CMA is the sponsor of this

research—particularly its Executive Director, John McAvity. Conner (2013) then defined the

group of people who are the focal point of the change as the "targets" (1:12), or the people the

change is designed to support. In this case, the targets are museum workers of all kinds, working

both within and for museums and related organizations across Canada. Third, Conner (2013)

defined the agents as those who help with the development and execution of plans that may come

out of the inquiry (1:31). In this inquiry, the agents might include CMA staff and possibly some

partner agencies, such as the Department of Canadian Heritage, provincial museums

associations, or museums studies programs that might be identified through the inquiry (the

CMA often works in partnership with other agencies across the sector). Last, Conner (2013)

identified a group of stakeholders he termed "advocates" (2:03), who want the change but are not

the position of power to sanction it. In some ways, the advocates for the inquiry are the same

individuals and groups as identified as both agents and targets: they are museum workers across

Canada who might benefit from leadership development opportunities that could be created by

the CMA. Accordingly, I engaged a cross section of the CMA membership from among these

groups.

     Although this was a qualitative study and demographic information was therefore not

intended to be statistically relevant (Sink & Mvududu, 2015), I nonetheless considered age, stage

of career, geography, gender, and different types of organization as a means of gaining varying

perspectives.

Inquiry Context: The Sponsoring Organization and the Museum Sector

     About the Canadian Museums Association.

     Founded in 1947, the CMA was created to act as a national network to speak on behalf of

Canadian museums (Canadian Museums Association, 2014, About the CMA). At that time, there

were about 100 museums in Canada, and 13 of them joined together to form the CMA. Today,

there are over 2,500 museums in Canada, and according to the Department of Canadian Heritage

(2014), they employ 32,000 workers and an additional 96,000 volunteers (p. 4). The Department

of Canadian Heritage uses CMA's definition of a museum, which states that a museum is:

> A non-profit, permanent establishment, exempt from federal and provincial income taxes,
>
> open to the public at regular hours and administered in the public interest for the purpose
>
> of collecting and preserving, studying, interpreting, assembling, and exhibiting to the
>
> public for its instruction and enjoyment, objects and specimens of cultural value, including
>
> artistic, scientific (whether animate or inanimate) historical, and technological material.
>
> (Canadian Museums Association, 1999, p. 3)

In keeping with this broad definition, the CMA states that their "membership consists of non-

profit museums, art galleries, science centres, aquaria, archives, sport halls-of-fame, artist-run

centres, zoos and historic sites across Canada" (Canadian Museums Association, 2014, About

the CMA). Approximately 2,000 of these are institutional members of CMA, and there are

another 600 individual and student members (Canadian Museums Association, 2014, About the

CMA).

In 2015, as part of its strategic planning process, the CMA developed a new vision and

mission for the organization, in consensus with a cross section of its members. The vision states

that "Museums are valued public institutions that inspire understanding and encourage solutions

for a better world" and the mission states that "The CMA exists to advance Canadian museums

to ensure meaningful connections with their communities by providing leadership, fostering a

national museum community, and increasing the value of museums to society" (Canadian

Museums Association, 2015, p. 8). The *CMA Strategic Plan 2015–2018* stated "we have heard

from our membership that the three major trends facing the sector are threats to government

funding at all levels, changes to the workforce, and the need for more professional development opportunities at every stage" (Canadian Museums Association, 2015, p. 6).

As part of this work, the new strategic plan also identified six core values for the CMA and leadership is listed first: "We value enhancing the leadership skills of museum professionals at all levels to further the goals of the CMA and the museum community" (Canadian Museums Association, 2015, p. 9; see Appendix A for the complete list of values). As an advocacy agency that strives to understand the needs of, and act in the interests of its membership, the CMA is the appropriate national agency to support an inquiry into how it might support the development of leadership among its membership across Canada.

Situating the inquiry within the CMA.

Museums have changed substantially since the CMA was founded and they will continue to evolve. As museums evolve, so must the people who lead them—the growth of organizations is intrinsically linked with the growth of the individuals within and around them, and it is these "individual changes that contribute to the overall health and stability of the entire system" (Wheatley, 2007, p. 47). Among its many activities in support of the sector, the CMA has an opportunity to become the leader in the conversation about leadership development for museum workers in Canada.

This inquiry was designed to support the CMA in meeting its newly revised vision and mission—by engaging the membership to discuss two of the three major trends identified above (changes to workforce and professional development) through the lens of leadership—and to identify concepts and strategies to support professional leadership development that the CMA could pursue. With its long history of advocating for Canadian museums and expanding the

professional capacities of the sector the CMA is best positioned to take the lead on any possible

outcomes given their newly revised vision, mission, and values.

About museums in Canada today.

Systems thinking is the capacity to see interconnectedness and patterns of interdependency

among the systems we have created and which we are always re-creating through our actions,

choices, and beliefs (Senge, 2006, p. 343). It is about seeing what *is* (Kouzes & Posner, 2007, p.

32) as well as seeing into the future. Wheatley (2007) used the natural world as a source of

metaphor for talking about the systems we have collectively created, likening them to living

ecosystems (p. 85) which are constantly growing and changing, dying, and being re-created.

Drawing on the natural world to explore the interdependencies within the system of

museums and heritage agencies in Canada, we might view the various advocacy organizations,

university and other training programs, crown corporations, government agencies and museum

workers themselves as stars in a constellation. If the CMA occupies a central position in this

museological constellation, peers include the provincial museums associations, the Department

of Canadian Heritage, the Canadian Conservation Institute, the national museums (there are six;

see Appendix B for the complete list), museums and heritage studies programs (for example, the

cultural heritage and conservation management program at Fleming College in Ontario, or the

cultural resource management program at the University of Victoria, among several others in

Canada). This museological constellation also includes peer advocacy agencies which have

evolved from the CMA, such as the Canadian Association of Science Centres and the Alliance of

Natural History Museums of Canada (among others). Funding moves between these agencies,

organizations, and individual workers in the form of a series of complex flows of crown

appropriations, operating funds, project grants, awards, membership dues, and so on (Department

of Canadian Heritage, 2014, p. 9); museums also generate earned revenue through ticket sales, and ancillary operations such as restaurants and school programs.

Canadian museums (like others around the world) are struggling to balance the preservation of our material heritage in the public trust, against the need for public engagement in an era in which funding for museums is decreasing (Canadian Museums Association, 2015, p. 6). According to the Library of Parliament (Langlois, 2013), appropriations for the six national crown corporation museums have decreased so much "since the mid-1990s, [that] public funding for museums has not been sufficient to allow the effective operation of the museums" (p. 6). In a clear confirmation of this issue, the 2016 federal budget directly addressed this, proposing to provide up to CAD $105.9 million to the national museums over five years, including CAD $6.1 million for immediate operational and capital measures (Department of Finance Canada, 2016, p. 189). These data refer only to the national museums; the situation is likely even more challenging for the smaller museums across the country. As journalist Val Ross wrote in the *Globe and Mail* in 2006, Canada's

> heritage collections and sites are in chronic crisis. No one is actively trying to obliterate them in the way that the Taliban blew up the Bamiyan Buddhas; rather, neglect and underfunding threaten to accomplish the same result, in slow motion. (p. 1)

Today, many museums "struggle to maintain their stability in the face of the complex challenges of the non-profit world" (Janes & Conaty, 2005, p. 3). For example, the Royal Ontario Museum currently carries a CAD $33.3 million debt, eight years after the completion of their capital expansion (Knelman, 2015, para. 8). As organizations, many Canadian museums are just surviving, which brings to mind the words of renowned museum scholar, the late Stephen Weil (2000): "survival is not a valid end in itself" (p. 2). In spite of this, and according to the CMA (as

cited in Langlois, 2013), visitors to museums and heritage institutions inject about CAD $17

billion into the economy each year (p. 7).

Imperative for change.

In the introduction to her book *The participatory museum*, Simon (2010) noted bluntly that,

"over the last twenty years, audiences for museums, galleries, and performing arts institutions

have decreased, and the audiences that remain are older and whiter than the overall population"

(p. i). Dwindling audiences clearly indicate that carrying on as museums have always done is not

a long-term option, and that museums need to re-evaluate their value proposition, which Falk and

Sheppard (2016) defined as the products and services a museum creates "to support the public

good it seeks to achieve" (p. 235). Matelic (2007) affirmed this:

> museums worldwide are now realizing that their traditional activities of collecting,
>
> preserving, researching, and exhibiting are simply no longer adequate. Instead, they are
>
> now challenged to justify their existence and support in terms of their public service value,
>
> or the positive contribution that they make to their communities. (p. 2)

There is much written about this pressing need for organizational change (Ackerson &

Baldwin, 2014; American Alliance of Museums Center for the Future of Museums, 2008;

Anderson, 2012; Beasley, 2012; Janes, 2009, 2013, 2016; Janes & Conaty, 2005; Matelic, 2007,

2011, 2016; Simon, 2010; Weil, 1999, 2000), but as Janes (2009) noted, there is little reflection

on "the people and resources required to do the work, including strategic plans, organizational

structure, staffing, training, communication, and so on . . . these topics suffer from neglect and

disregard" (p. 58). McCall and Gray (2014) agreed, noting that "a great deal of museological

literature assumes that as a result of rethinking of the purposes of museums, real change has

occurred in *both* the understanding of museum functions *and* the activities that museums

undertake" (p. 21). In fact, there has been "relatively little analysis of actual museum practice" (McCall & Gray, 2014, p. 21). Whether or not museums succeed in rethinking their purposes, this alone will not ensure success: museums must also rethink how they run their organizations (Janes, 2009). The Alberta Museums Association (2007) affirmed the need for leadership development across the sector at all levels: "From small, rural historical societies to large national institutions, ensuring that there are adequately trained individuals able to provide leadership, at all levels within an organization, is an issue confronting museums" (p. 4). Ackerson and Baldwin (2014) agreed, highlighting the need for strong leadership in challenging times: "it is a potent antidote to the malaise afflicting the museum field as a whole" (p. 1). As museums re-envision their programs and their public value proposition, they may also stand to benefit from a larger, collective conversation about the related changing needs of museum leadership.

To date, there is not much written about leadership models in museums, and even less that is specific to Canada. According to Janes (2009), museums have, by and large, maintained a predominantly hierarchical leadership model, which he contended is fraught with problems and requires a systemic change. Janes (2009) advocated for museums to move away from a system that holds one person accountable for everything, because it leaves those leaders isolated, "hopelessly overburdened, and ineffective" (p. 64). There is little additional research on museum leadership, as Johnson (2012), then a faculty member with the Getty Leadership Institute's *Museum Leaders: The Next Generation* program, confirmed, "little empirical research exists which helps understand how professionals in museums think about [leadership]" (p. 11). The work of Australian museologist Suchy (1999, 2000, 2004) is on topic but now somewhat dated and, in addition to Johnson's (2012) own dissertation, there are two other recent dissertations that

investigate museum leadership by American Candace Matelic (2007) and Canadian Joy Davis (2011). Ackerson and Baldwin (2014) have written a comprehensive study of leadership in history museums in both the United States and Canada that offered a detailed insight into the urgent need for leadership training in museums.

Where the museum literature does discuss leadership, it has tended to do so primarily in terms of identifying the need for succession planning. For example, in 2006 the Museum Association of New York conducted a survey titled *Who's next? Questioning the future of museum leadership in New York State*, which asked museum workers about succession planning (among other issues related to leadership). While many respondents were concerned with succession planning, only nine per cent of organizations had developed, or were developing, a succession plan (Ackerson & Baldwin, 2006, p. 350). As Janes (2009) confirmed, "succession and transition planning are still uncommon in the museum world" (p. 62). Given the operational similarities between Canadian and American museums, it is reasonable to assume a similar pattern applies in Canada. In Canada, there was a related project developed by the Alberta Museums Association in 2007, in which they created a Leadership Working Group to "delve into leadership issues facing Alberta museums, and to specifically examine the matter of leadership gap" (Alberta Museums Association, 2007 July, p. 4). The group completed one report that identified a number of action items and called for an update on the project in June 2008 (p. 17). The update, however, was not completed and several of the action items have not yet been pursued (A. Hatcher, personal communication, October 23, 2016)[1].

---

[1] All personal communications in this report are used with permission.

Beyond recognizing the importance of succession planning, the museum sector has not yet explored individual museum leadership development (Johnson, 2012, p. 77). In answering her own question, "Why is Canadian talent being overlooked for top jobs at key museums and art institutions?", Sandals (2016) pointed out that recently many art museum directors have been hired from outside Canada, or are Canadians who have spent significant time abroad. She also noted that if Canadian museums are to address the pending leadership crisis, then "museums and other arts institutions clearly need to do more to develop—and this means, hiring—new Canadian leadership talent" (section 3). To do this, the sector must move beyond discussing succession planning—which may only serve to maintain the current hierarchical model—to have the related discussion of what the nature of museum leadership should or could be in 21st century Canadian museums.

John Cotton Dana, writing in 1917 about the future of museums, asked the question, "do we need museums at all?" (p. 32). As if in answer to this question, some 100 years later, Anderson (2012) wrote of her conviction that "a fundamental shift in ideology and practice is essential for museums to remain relevant and integral in a twenty-first century world" (p. 8). In other words, if museums do not respond to the world around them, the answer to Dana's question will be no.

Thesis Overview

This first chapter provided an overview of the inquiry project, including the main research question and sub-questions, followed by a description of the significance of the inquiry to the Canadian museum sector, and a review of the context of the inquiry both within the CMA and in the Canadian museum sector. It concluded with a summary of the imperative for change in Canada's museum sector.

Chapter 2 is a literature review that endeavours to establish the theoretical context for this inquiry through a review of three topics: self-leadership, museums and community, and museum leadership development.

Chapter 3 explains the action research (AR) methodology employed in this study, specifically the use of an action research engagement (ARE) model overlaid with an appreciative stance (which is not a full appreciative inquiry process, but rather borrows from its constructive and positive approach). The chapter then describes the inquiry team, project participants and project methods, including how the data were collected via interviews and a focus group, how the study was conducted, how the data were analyzed, and the steps taken to ensure validity. It concludes with an overview of the relevant ethical issues.

Chapter 4 summarizes the findings from the participant data, and offers conclusions grounded in the findings and the literature reviewed in Chapter 2 relating to the significance of developing self-leadership to building community relevance for Canadian museums. It also reviews the scope and limitations of the inquiry.

Chapter 5 summarizes the implications of the inquiry, and offers four recommendations based on the findings and conclusions presented in Chapter 4, including a summary explanation of the organizational implications for the CMA and possible topics for future inquiry. It concludes by reviewing the possibilities for developing self-leadership among the membership of the CMA.

Chapter 2: Literature Review

The literature review strives to establish the theoretical context for this inquiry's main question, "How might the CMA facilitate leadership development among its members?" Three topics will be explored in this chapter:

1. Self-leadership

2. Museums and community

3. Museum leadership development

The first topic explores the concept of self-leadership, its connection to organizational leadership, and the importance of developing leadership at all levels within an organization. It is intended to help ground the discussion about contemporary museum leadership and provide insight into possible leadership models for the future of museums and museum workers.

The second topic, museums and community, explores current literature regarding the changing role of museums in society, and offers several models which museums can adopt to connect with community, including community building, participation and co-creation, and activism. It summarizes the significance of social relevance to the future of museums, and provides context for the inquiry as a whole to ground the second sub-question: "What vision do CMA members have for Canadian museums 10 years from now?"

The third topic, developing museum leadership, offers a brief review of possible organizational models for museums and the relevance of developing leadership at all levels in museums. It briefly reviews current writing about the development of museum leadership competencies, and recent efforts to offer professional leadership development opportunities in Canada. It is intended to inform discussion around the third and fourth sub-questions: "What

kind of leadership do Canadian museums need to realize that vision?" and "How might the CMA develop this leadership in Canada?"

Theoretical Framework

   Topic 1: Self-leadership.

   This topic begins with a discussion of self-leadership, or personal mastery, moves into its connection to organizational leadership, and closes by exploring the importance and impact of developing leadership at all levels within an organization. It is intended to help ground the discussion about contemporary museum leadership and provide insight into possible leadership models for the future of museums and museum workers.

   Self-leadership defined.

   Self-leadership is the practice of continuous learning—about the world and about oneself (Abe & Chowdhery, 2012; Senge, 2006). In Senge's (2006) seminal work, *The fifth discipline*, he asserted that successful organizations are those that practice continuous learning and actively identify themselves as learning organizations. According to Senge (2006), learning organizations foster five disciplines which, taken together, drive the organizational learning habits necessary for navigating our increasingly complex and dynamic world. These are: systems thinking, personal mastery, mental models, building shared vision, and team learning (Senge, 2006, pp. 6-9). Alone, self-leadership is not sufficient for building learning organziations, but rather, these five key attributes must be nurtured simultaneously, and when they are, Senge (2006) asserted that they lead to organizational learning.

   Here I focus on personal mastery, or self-leadership. For Senge (2006), personal mastery was the art of "becoming committed to lifelong learning . . . it is the discipline of continually clarifying and deepening our personal vision, of focusing our energies, of developing patience,

and of seeing reality objectively" (p. 7). This discipline requires a high degree of self-awareness, emotional intelligence, and a willingness to dig into the complex questions of life. It requires an ongoing process of inquiry as a habit of mind, and awareness of one's areas of ignorance and incompetence as a path to growth. Many researchers (Jackson & Parry, 2011; Pless, 2007; Senge, 2006; Short, 1998; Wheatley, 2007) have written about the simple power of leading from a profound sense of self (regardless of formal management designation or role), connected to a deep commitment to a cause bigger than the self, and to personal values. It is through a practice of personal mastery that personal vision, values, and clarity of purpose become clearer.

Self-leadership is also understood as the process of cultivating compassion for the self—and again this is linked to the whole—because through a greater understanding of our own challenges, we are more able to understand the challenges faced by others. Armstrong (2010) reminded us that unless we have compassion for ourselves, we cannot have compassion for others, because ultimately we are all facets of the universe and therefore one (p. 82). Developing compassion is a key capacity for seeing different perspectives, which is fundamental to learning: being able to see what is (Kouzes & Posner, 2007). It was for this reason that Senge (2006) held personal mastery as "an essential cornerstone of the learning organization . . . [and that] an organization's commitment to and capacity for learning can be no greater than that of its members" (p. 7). Again, self-leadership alone does not lead to organizational learning, but must be nurtured in parallel with the other four attributes which Senge (2006) attributed to learning organizations, namely: mental models, team learning, shared vision, and systems thinking.

Senge (2006) believed that personal mastery "fosters the personal motivation to continually learn how our actions affect our world . . . without it people are so steeped in the reactive mindset (someone/something else is creating my problems)" (p. 12). Moving beyond a reactive

mindset comes from cultivating mindfulness and self-awareness. Kouzes and Posner (2007) echoed this clearly: "the most critical knowledge for all of us—and for leaders especially—turns out to be self-knowledge" (p. 346). This is powerful for organizations because knowledge of self, and self-development, builds confidence (Kouzes & Posner, 2007, p. 344), and confidence links to stronger performance (Stewart, Courtright & Manz, 2011), regardless of one's role within an organization.

Self-leadership and its connection to organizational leadership.

The links between self-leadership and organizational success are put forward clearly by many writers (Kouzes & Posner, 2007; Senge, 2006; Stewart et al., 2011; Wheatley, 2006). As Senge (2006) wrote, there is a direct connection between self-leadership and organizational success:

> People with high levels of personal mastery are more committed. They take more initiative. They have a broader and deeper sense of responsibility in their work. They learn faster. For all these reasons, many organizations espouse a commitment to fostering personal growth among their employees because they believe it will make the organization stronger.
>
> (p. 133)

Rowe, Graf, Agger-Gupta, Piggot-Irvine, and Harris (2013) also linked personal learning to organizational change; they asserted that "transformational changes at the personal and team levels need to occur before outcomes at the system level can be manifested" (p. 9). In writing about self-organizing systems, Wheatley (2006) linked the significance of a strong sense of self, for both individuals and organizations, to the ability to live in balance with a given context, and the means to cultivating resiliency and stability in the face of complex and fluctuating conditions. Wheatley (2006) noted that, "in organizations, just as with individuals, a clear sense

of identity—the lens of values, traditions, history, dreams, experience, competencies, culture—is

the only route to achieving independence from the environment" (p. 86). Thus, organizations that

aim to be resilient and flexible in the face of change must be constituted by people who have that

same resiliency, that same sense of self.

Developing leadership at all levels.

Leadership, and specifically the practice of self-leadership or personal mastery, can

strengthen organizations. However, as Senge (2006) wrote, "the very word 'leader' has come to

refer largely to positional authority, a synonym for top management" (p. 319). Senge (2006)

went on to explain that the problem with the conflation of the concept of leadership with senior

management is that it conveys the message that the "only people with power to bring about

change are those at the top of the hierarchy, not those further down" (p. 319). In reviewing 30

years of literature on self-leadership, Stewart et al. (2011) offered the conclusion that self-

leadership (where intrinsically motivated) has been shown to increase confidence, reduce stress,

and lead to career success and better outcomes for organizations; however, it still requires the

external leadership of others, and is perhaps better viewed as an:

> influence process that can be complementary to and facilitated by external leadership.
>
> Effective self-leadership requires contributions from external leaders, albeit contributions
>
> that are very different than those traditionally associated with a command and control
>
> perspective of leadership. In essence, the external leader role moves away from director
>
> and boss toward acting as a coach and a catalyzing support. (p. 209)

If this is true, for change to occur and for organizations to become learning organizations, they

are better served by encouraging the development of self-leadership among all staff and

cultivating strong leadership across the organization. Trompenaars and Voerman (2009)

expressed the importance of self-leadership development at all levels in organizations as a means of developing stronger organizations from a global systems perspective:

> At every level, in every position, people have to take the opportunity to bring the best out of themselves, because the best for themselves is also the best for the company, and in the broader perspective for the world at large. (p. 31)

Writing in 2007, Kouzes and Posner also made this point clearly: "leadership is everyone's business" (p. 337), and "it is not about organizational power or authority" (p. 338). Effectively, leadership development, and specifically self-leadership development, has a strong positive effect on an organization's capacity to be successful.

Topic 2: Museums and community.

This topic offers a brief overview of the literature regarding the changing role of museums in society, and explores several modes in which museums can connect with community, including community building, participation and co-creation, and activism. It summarizes the significance of social relevance to the future of museums, and provides context for the inquiry as a whole, to ground the second sub-question: "What vision do CMA members have for Canadian museums 10 years from now?"

Community building.

As museums grapple with the realities of day-to-day urgencies, many believe that museums must reinvent themselves to become socially relevant, globally mindful, and locally engaging sites of debate, dialogue, and learning (Ackerson & Baldwin, 2014; American Alliance of Museums Center for the Future of Museums, 2008; Anderson, 2012; Beasley, 2012; Janes, 2009; Janes & Conaty, 2005; Matelic, 2007; Simon, 2010; Weil, 1999, 2000). As Matelic (2011) defined it, "The central purpose of museums is to serve their many publics at the level of making

a meaningful difference in the lives of individuals and contributing significantly to the

communities they serve" (p. 141). Janes (2009) moved beyond connection to immediate

geographic community to global issues such as climate change, conflict, food scarcity, and so on:

"Can we not expect more deliberate reflection from museums about their societal role—as

organizations that pride themselves on their historical acuity and their objective frame of

reference?" (p. 22). Here it is important to clarify that community building, through ongoing

engagement, is not the same as audience development. According to Matelic (2016), community

engagement is a long-term, externally focused effort to address community needs and social

change through collaborative partnership, whereas audience development is an internally focused

effort intended to address museum needs. Where audience development is focused on the

museum first, community engagement is community first. Community engagement is about

building real relationships and

> courageously addressing the tough issues in their communities, often beginning with
>
> offering a safe and neutral place for dialogue, and then using their resources—collections,
>
> exhibits, and programs—to raise awareness, provide a historical or cultural context, and
>
> advocate for social change. (Matelic, 2016, p. 351)

It is about moving from an internal survival mode (Matelic, 2016; Weil, 1999) to an external

focus, because "In terms of long-term organizational relevance and sustainability, our

organizations must move towards addressing what matters in our communities" (Matelic, 2016,

p. 357), as this "in turn, builds your audience and position of importance in the community"

(Matelic, 2016, fig. 2)—but this only works if museums take an authentic approach to listening

and are genuinely committed to contributing to building community.

In writing about how museums ought to evolve in relationship to community, Anderson (2012) listed what she holds as core beliefs, or perhaps criteria, for the museum of the future, including the idea that "museums are central to the vitality and health of cities and can serve as gathering places for building community and dialogue around contemporary issues" (p. 9). Canadian author Carbone (2003) also emphasized the dialogic role of museums, as he stated that [exhibit development should be a collaborative enterprise between a museum and community, because] "The creation and dissemination of knowledge, especially when it sheds light on the human condition, cannot be carried out in isolation, but must be a dialogue that raises social and historical consciousness" (p. 36). However, here, Janes and Conaty (2005) have identified a related gap between theory and practice: "there is nearly continuous rhetoric on the need for partnership and collaboration between museums, as well as with their communities, with only modest results to date" (p. 6). Almost ten years later, Ackerson and Baldwin (2014) reaffirmed this, noting that while "an awesome handful of . . . museums make a difference in their communities . . . there are nowhere near enough" (p. 197). The point is clear: museums, as a sector, talk a lot about working in service to their communities, but not many are undertaking this work in practice.

Retired chief planner for the City of Vancouver, Larry Beasley (2012), echoed this essential role of community collaboration in a recent talk to the International Council of Museums' Committee for the Collections and Activities of Museums of Cities (ICOM-CAMOC) at the Museum of Vancouver:

> There is no constant force for an ongoing engagement and dialogue and interface between people and the diverse realities of city life. And cities are certainly worse off because of

that. I think that force could be the city museum. I think that force could be you.

(paras. 7-8)

It is encouraging that others beyond the sector see the role museums could play—but by noting

that museums *could* play a lead role in building community around contemporary issues, Beasley

(2012) also clearly illustrated that he was not yet seeing museums doing so.

Relevance.

Created by the American Alliance of Museums, the Center for the Future of Museums

(CFM) highlights the importance of strong community relationships as a path to a more

sustainable future and helping "museums shape a better tomorrow by exploring cultural, political

and economic challenges" (American Alliance of Museums, n.d., Center for the Future of

Museums). The CFM works to help museums understand the complex contexts in which they

operate and help them build relationships with community. The CFM publishes an annual

"TrendsWatch" that "monitors cultural, technological, political and economic trends of

importance to museums; equips museums to help their communities address the challenges of

coming decades, and builds connections between museums and other sectors (American Alliance

of Museums, n.d., Center for the Future of Museums).

In 2008, the CFM commissioned a report, *Museums and Society 2034: Trends and*

Potential Futures, which identified major trends facing America and grouped them into four

categories, explored what they mean for society, and then more specifically, discussed what they

might mean for museums. The report covered a broad sweep of social issues from aging

populations, to our increasingly multi-ethnic society, economic globalization, and more

(American Alliance of Museums Center for the Future of Museums, 2008, p. 17). In addressing

such a broad range of issues, and specifically how they intersect with museum practice, the CFM illustrated the socially relevant role they believe museums should play.

Participation and co-creation.

The future of museums is also often spoken of in terms of participation and co-creation. Simon (2010) noted that "by pursuing participatory techniques that align with institutional core values, it is possible to make your institution more relevant and essential to your communities than ever before" (p. iv). She has lived this: Simon became Executive Director of the Santa Cruz Museum of Art and History in 2011 and by March 2013 she had increased annual attendance from 17,349 to 37,361—an increase of 120% (Perry, 2013, Creators versus critics, para. 4). By 2015 that number was 52,000, and in the past five years their budget has doubled (Santa Cruz Museum of Art and History, n.d., Mission and Impact).

Co-creation is a model of participation that could play a larger role in the future of museums:

> if competition was at the heart of the old business paradigm, then the concepts of cooperation and co-creation must now be at the heart of the new paradigm . . . it may apply to our collaborative work with other institutions, or it may describe our changing relationship to our visitor. (Falk & Sheppard, 2006, p. 158)

For example, Ernst, Esche, and Erbslöh (2016) described a case study in which a publicly funded contemporary art museum, the Van Abbe museum in Eindhoven, The Netherlands, worked with business to explore the museum's possible role in inspiring culture change around sustainable development. In effect they were co-creating a new model for private companies and cultural institutions to work together. They did this because together they recognized that museums and cultural organizations "present art as ways to explore how to stay meaningful in a world . . .

[which means] these institutions have the potential to play a crucial role in preparing for change, introducing new social desires and managing fear" (Ernst et al., 2016, p. 1446). They recognized that our global need for system change comes at a time when the finances of publicly funded, non-profits are becoming increasingly challenging. For these partners, co-creating a means to shift consumer behaviour around sustainable development was an effective use of resources.

While demonstrating an interesting model of co-creation, the work of Ernst et al. (2016)— "in which private companies and cultural institutions can develop mutually beneficial systems of support" (p. 1446)—also illustrated a market-driven agenda. The business effectively capitalized on the understanding that many museums are responding to changing demands of the public with different kinds of exhibitions and programs and, in this instance, they used it "to shape cultural awareness of environmental and social problems and to locate them within an understanding of an interconnected, globalizing economy and contemporary culture" (Ernst et al., 2016, p. 1450). This project moved progressive values related to sustainability forward, but did so to improve the financial position of both the museum and the company. Co-creation may be a serviceable model for connecting with community, but will require a deep understanding of which values are embraced and moved forward in the name of public service and engagement.

Activism.

One useful element in the work of Ernst et al. (2016) was their clear language about the potential for museums to be socially relevant in shaping our collective future through activism:

> if [museums] dare to offer different audiences the space to ask meaningful questions they
> can more pro-actively use their competencies to consciously tap into the collective memory
> and uncover historic patterns that can be beneficial to solve present social and

environmental problems. They can show context-appropriate pathways into the future.

(Ernst et al., 2016, p. 1450)

In other words, simply, museums can use their specific expertise around interpreting the past to help share our future—the twist is that museums can do this with a specific agenda, consciously, transparently, and carefully selected, with a view to influencing public opinion.

The concept of activist museums emerged as one of the strongest themes at MuseumNext 2016, a global conference on the future of museums. Created in 2009, according to its founder Jim Richardson, "MuseumNext came out the shifting technological landscape of the first decade of the 21st century. Digital media was [sic] transforming society and shifting audience expectations and we saw that museums needed to embrace change, or risk extinction" (MuseumNext, 2016, section 1). He explained that delegates are interested in the "power that cultural institutions have to inform the public about challenging issues, how museums add to the political power of a city and how we can ensure that culture is open to all" (MuseumNext, 2016, section 7).

A move to an activist position is almost a complete reversal of the traditional museum model in which an institutional voice of authority was held up as the ideal (Anderson, 2012, p. 3). Janes (2009) described this as "authoritative neutrality" (p. 59) and exposed the fallacy at the heart of it: that when museums avoid taking risks because they might antagonize sponsors or corporate partners, they are, in effect taking a position in line with corporate values and beliefs which is therefore not neutral. Janes (2009) went on to acknowledge that moving beyond the so-called "neutral" position "requires judgement and risk-taking, and the potential for both enhancing the public good, or abusing it, lie dormant in every opportunity" (p. 59). In other words, it is impossible not to take a neutral position when presenting topics and objects to the

public, so transparency, clear values and careful planning become critical. An activist model is a direct way to align with a specific sector or community, by taking a clear stand on an issue and actively working with community towards a shared outcome.

The Natural History Museum (Natural History Museum, n.d., About), a project of Not an Alternative (a New York based non-profit), strives to affect public discourse through art, activism and theory and is a good example of an activist museum. Created in 2014, it is a mobile museum that takes a position on environmental science, making a point of examining the socio-political forces that shape nature. In partnership with other museums, it works to:

> reframe the past to save the future . . . [by] partnering with museums to develop programs that help make the subjects of science and natural history more relevant to the day to day lives of the communities they serve . . .[its] programs pick up where traditional exhibits leave off, by connecting static displays to pressing contemporary concerns and world events. (Natural History Museum, n.d., About)

Among its activities, the Natural History Museum wrote an "Open letter to museums from members of the scientific community," signed by 148 scientists. Dated March 24, 2015, the letter stated:

> We are deeply concerned by the links between museums of science and natural history with those who profit from fossil fuels or fund lobby groups that misrepresent climate science (para. 1) . . . For example, David Koch is a major donor, exhibit sponsor and trustee on the Board of Directors at the Smithsonian's National Museum of Natural History, and the American Museum of Natural History. David Koch's oil and manufacturing conglomerate Koch Industries is one of the greatest contributors to greenhouse gas emissions in the United States. Mr. Koch also funds a large network of

climate-change-denying organizations, spending over USD $67 million since 1997 to fund

groups denying climate change science. (Natural History Museum, 2015, para. 7)

It is significant to note that in January 2016 David Koch stepped down from the board of the

American Museum of Natural History, although he remains on the advisory board of the

Smithsonian National Museum of Natural History (Yuhas, 2016, para. 1). The rise of activist

museums intersects with the rise of other activist groups also focused on museums, such as

Liberate Tate, which calls specifically on the U.K.'s Tate Museum to take a leadership role in

society on the global issue of climate change by abandoning its sponsorship support from the oil

company British Petroleum (BP). There are many models for the ways in which museums can

become more connected to community—whether through community building, co-creation,

participation, or activism—but the theme is clear: museums must operate in relationship to the

world in which they exist.

Topic 3: Developing museum leadership.

Leadership is a relatively new topic in museum discourse (Ackerson & Baldwin, 2014, p.

45; Johnson, 2012, p. 77). Museums are complex, and accordingly it follows that the skill sets,

personal attributes, values, and specific expertise required to manage them are also complex.

This topic endeavours to review writing about museum leadership models, the benefit of self-

leadership development at all levels specific to museums, museum leadership competencies, and

leadership development activity in the Canadian museums sector.

Models for museum management.

In writing about new business models for museums, Falk and Sheppard (2006)

acknowledged that "the critical question for any museum is . . . how can it build an organization

that will thrive long into the future?" (Falk & Sheppard, 2006, p. 231). The answer lies partially

in leadership: the new standards for museums in the 21st century rest on "creating public good, building a learning organization, fostering community collaboration and generating financial surpluses" (Falk & Sheppard, 2006, p. 225). With respect to leadership, Falk and Sheppard (2006) were explicit: "Museums must move away from command-and-control, top-down management" (Falk & Sheppard, 2006, p. 224) to systems which enable multidirectional communications both internally and externally.

In considering new models for museum leadership, Janes (2009) also called for a move away from hierarchical models, and put forward a model he called "*primus inter pares*, or first among equals. The primus is the leader, but not the chief, and must prove and test his leadership among a group of peers" (p. 62). For Janes, the strength of the organization rested on each individual's leadership capacity within their immediate sphere of influence, rather than the power associated with a hierarchical position. Anderson's (2012) model for the "reinvented museum" also called for a move away from single visionary leaders to one in which leadership is shared (p. 3), and away from a hierarchical structure to Senge's (2006) learning organization (Anderson, 2012, p. 4).

One model that could possibly be applied to museums is co-leadership, a common model in the performing arts in which one director is responsible for the creative activities and the other for operations. Beard (2012) noted "the dual leadership structure found in the performing arts is profoundly distinct from structures found in most organizations" (p. 9). However, as Reid (2005) cautioned, co-directors are often chosen independently of each other by the board, with little consideration for the relationship between the two people. This can mean a high potential for conflict, as compared to an "emergent or self-chosen leadership structure, because the co-leaders may lack control over the choice of characteristics of the individual with whom they share

power" (p. 4). The co-director model and its potential for conflict could be a real concern for museums, given Kotler's (2005) recognition that the board members who select leaders often possess poor understanding of the operational realities of museums (p. 81).

There are clearly different models that museums could adopt, however, for any new or revised organizational model to work, it will need to be understood and accepted by staff members at all levels in an organization.

Leadership at all levels in museums.

To be successful, new governance models such as those put forward by Falk and Sheppard (2006), Janes (2009), and Anderson (2012) will require very different leadership, at all levels. In describing the reinvented museum, Anderson (2012) highlighted that good leadership is not just a requirement for those in senior management, but throughout organizations: "informed, humble, passionate, and enlightened leadership must be present at all levels in order to further the work of museums in a responsible, meaningful, and relevant way" (p. 9). The Alberta Museums Association (2007, June) affirmed this "as the champion of the vision and values, the leader does not have to be in an executive or senior position as leaders can be found at any level within the organization" (p. 4). Ackerson and Baldwin (2014) also recognized the need for leadership development for both individuals and organizations:

> The history museum field has not placed enough emphasis on the individual *and*
> institutional value of leadership training and development . . . it lacks understanding of
> who benefits from leadership training and development, and why it is important to keep
> pace with the field's changing needs; and that its ability to address issues of leadership
> training and development is hampered by the glacial pace of competency articulation and

leadership definition key to nurturing outstanding leaders. We think the museum field . . .

needs to put leadership at the top of the to-do list. (p. 195)

Ackerson and Baldwin (2014) limited their research and discussion to history museums, but

given the similarity of history museums to museums of all kinds, their words apply to the sector

at large. The Alberta Museums Association acknowledged this gap in the development of the

sector: "our organizations do not always take advantage of leadership at all levels and may not

encourage empowerment of employees" (2007, June, p. 7). Fostering leadership at all levels is

one way to mitigate the possibility of what some describe as a pending leadership gap (Alberta

Museums Association, 2007, June).

Falk and Sheppard (2006) suggested that museums measure the success of employee

training and institutional cultural attitudes related to both individual and institutional self-

improvement (p. 236), because in our increasingly complex world "it is becoming necessary for

knowledge workers to be in a continuous learning mode" (p. 236) They outlined the explicit

connection between continuous learning and self-leadership to overall organizational leadership:

Each individual associated with the organization should be encouraged to understand his or

her work-related identity needs, to set annual learning goals and have these goals

monitored and supported. To help foster a learning organization, all members of the

organization, from floor staff to trustees, should be empowered to act as both learners and

teachers, as both trainers and trainees. (Falk & Sheppard, 2006, p. 236)

The work of Senge (2006) echoes throughout this writing; clearly museum writers see the need

for museums to embrace internally what they endeavour to be in the public realm: organizations

that value learning and sharing learning with people of all ages and backgrounds. Museums are

explicitly intended to be learning organizations, as well as organizations that serve a social

purpose. As the literature demonstrates, learning organizations require employees who have a high degree of personal mastery, or self-leadership. Thus for organizations to be effective leaders in community, they would be well served to understand the connection between the self-leadership skills of their employees at all levels, and the overall leadership capacity of the museum in community.

Museum leadership competencies.

In writing about the leadership of history museums in the United States, Ackerson and Baldwin (2014) described successful museum leaders as "intentional about their leadership" (p. 37): they establish a clear vision, empower others, and "nurture their institutions through self-assessment, goal-setting, formal and informal learning, experimentation and teaching by example" (p. 37). Furthermore, these leaders "are hungry for community engagement" (Ackerson & Baldwin, 2014, p. 37). In an effort to address what they saw as a coming leadership gap, the Alberta Museums Association's Leadership Working Group defined leadership for museums as follows:

> The Alberta Museums Association Leadership Working Group recognizes that there are many layers to leadership, which are based on a foundation of vision and guided by a passion for the cause. Leadership turns vision into results. A leader possesses wisdom, inspires others and works within a set of values. Leadership is demonstrated through effective relationship building, communication skills and knowledge of the functional skills necessary to complete tasks. (2007, June, p. 7)

This report led to two significant projects. First, having identified that museum leadership requires specific competencies—particularly for sector specific roles, such as: executive director, curator, conservator, collections manager, museum educator, and interpreter—the Alberta Museums Association developed a comprehensive competency model for each of these roles (Alberta

Museums Association, 2007, September). The Alberta Museums Association identified the

following key skills for senior museum executives, including a specific set of leadership skills

(2007, June, p. 8):

Relevant business skills
    Finance
    Marketing
    Non-profit
	Institutional knowledge
	    Governance
	    Vision/Mission

Thinking skills
    Critical thinking
    Conceptual
    Out of box
	Leadership skills
	    Communication
	    Developing others
	    Lifelong learning

Develop strategic direction
    Tactical action
    Turning mission/vision into reality
    Risk taking
	Risk taking
	    Time management
	    Trust building
	    Peer connection
	    Authenticity

As a second outcome of the Leadership Working Group report, the Alberta Museums

Association undertook to provide the necessary training to develop these competencies, by

working with the Getty's Next Generation museum leadership development program to deliver a

Canadian adaptation of the program in partnership with the University of Alberta. The program

was described as:

> dedicated to providing a career development opportunity to exceptional museum
>
> professionals who have a desire to develop their leadership abilities, an ambition to build
>
> capacity within museums of any size or scope, and an aspiration to be directors or to hold
>
> senior leadership positions in the museum sector. (NextGen, 2011, p. 1)

According to former association Executive Director, Alexandra Hatcher, the first course offering

was successful, but the Getty subsequently experienced some major changes and put all their

programs on hiatus for a year (A. Hatcher, personal communication, October 15, 2016). In 2009,

the Getty Foundation announced a USD $2.2 million grant to move the Getty Leadership

Institute to Claremont Graduate University, where it continues (Claremont Graduate University, 2016, About GLI).

Museum leadership development.

In an effort to continue the NextGen project, the Alberta Museums Association approached the Banff Centre for Arts and Creativity about delivering museum leadership training. In 2015, following some national consultations with the sector, the Banff Centre[2] announced the launch of a new program dedicated to cultural leadership. Called *New fundamentals: Leadership for the creative and cultural sector*, the program guide stated that "creative and cultural organizations need new models of leadership aligned with the unique qualities and characteristics of the sector" (Banff Centre, 2015, p. 1). It ran from March to November 2016, but whether it will run again is not clear as it was not included in the line-up of leadership programs on offer at the time of writing (Banff Centre, 2016, Programs).

The CMA's strategic plan for 2015–2018 acknowledged the need for a concerted approach to professional development, and identified that the CMA will conduct a sector needs assessment regarding training and professional development (not specifically leadership), and then work with partners to develop and implement a "national museum training and professional development strategy" (Canadian Museums Association, 2015, p.11). Among the many practical suggestions offered in Ackerson and Baldwin's (2014) call for a "leadership revolution" in museums, they included specific suggestions to support the work of professional associations in the development of leadership. I cite the complete list below to illustrate that there is a broad

---

[2] Founded in 1933 in Canada's Rocky Mountains, the Banff Centre for Arts and Creativity is a leading "learning organization built upon an extraordinary legacy of excellence in artistic and creative development. What started as a single course in drama has grown to become the global organization leading in arts, culture, and creativity across dozens of disciplines" (Banff Centre, 2016, About Us).

range of practical actions that professional associations can undertake to foster leadership

development, including the following:

- Heighten awareness of the need for leadership training, standards, and development

  by emphasizing it in existing professional development programs and in

  institutional assessment programs.

- Focus on leadership training and development as a key ingredient in building

  healthy history and cultural heritage museums.

- Expand commitment to leadership and succession planning education for boards.

- Develop, facilitate, and/or promote leadership training and development

  opportunities for boards and staff in collaboration with graduate programs,

  independent training organizations, and/or non-profit consortia.

- Promote equality in hiring, promotion, access to leadership opportunities, and

  compensation through collaboration with graduate programs, allied associations,

  collection and dissemination of research, and training.

- Insist upon competitive pay, institutional support of the emerging leader and lone

  professional, and the diversification of governing boards. (p. 203)

There is clearly a broad range of activities that professional associations can undertake to

support the development of leadership at all levels—from staff to board members—to strengthen

the operational effectiveness and future success of museums.

The efforts of the Alberta Museums Association, the Banff Centre, and the CMA's current

strategic plan indicate the need to provide museum leadership development for professionals

beyond post-secondary opportunities but, as yet, nothing exists for Canadian museum workers

specifically interested in learning about leadership in the context of museums. Recommendations

as to how the CMA might support leadership development moving forward are included in

Chapter 5.

Literature Review Summary

This literature review has endeavoured to establish context for this project's main question,

"How might the CMA facilitate leadership development among its members?", by exploring

three key topics: self-leadership, museums and community, and museum leadership

development.

The following chapter describes the research methodology employed to complete this

inquiry, including the inquiry team, participants, the project methods (including data collection

methods, study conduct and data analysis), and addresses the relevant ethical issues.

Chapter 3: Methodology

This chapter reviews the approach used to investigate the main inquiry question, which was developed with the support of the CMA. As a reminder to the reader, the question was: "How might the CMA facilitate leadership development among its members?" The following sub-questions also informed this inquiry:

1. What stories of leadership success do members of the CMA tell?

2. What vision do CMA members have for Canadian museums 10 years from now?

3. What kind of leadership do Canadian museums need to realize that vision?

4. How might the CMA develop this leadership in Canada?

This chapter begins with an overview of the action research (AR) methodology employed in this study, including the use of an action research engagement (ARE) model overlaid with an appreciative stance. It then describes the inquiry team, project participants, and project methods (including how data were collected via interviews and a focus group, how the study was conducted, how the data were analyzed, and what steps were taken to ensure validity), as well as an overview of the relevant ethical issues.

Methodology

The research methodology I used for this inquiry was AR, and more specifically, the action research engagement (ARE) model, informed by an appreciative stance.

Action research.

Action Research (AR) is a collaborative model of inquiry, reflection, and action as a means to effect change; it is a model that advocates several cycles of inquiry, activity, and reflection to generate solutions to questions at hand (Stringer, 2014). Reason and Bradbury (2001) offered the following widely used definition for AR:

Action research is a participatory, democratic process concerned with developing practical

knowledge in the pursuit of worthwhile human purposes, grounded in a participatory

worldview . . . it seeks to bring together action and reflection, theory and practice, in

participation with others, in the pursuit of practical solutions to issues of pressing concern.

(p. 1)

In other words, AR is about people working together to identify issues they want to address, and

working through several iterative learning cycles to improve their collective ability to address the

issues. It is typically led by a participant within a system to engage other members within that

system, through a "scientific approach to study the resolution of important . . . issues together

with those who experience these issues directly" (Coghlan & Brannick, 2014, p. 9). Given that I

am a member of the Canadian museum community, AR is an appropriate overall methodology

for the inquiry because it acknowledges the active participation of everyone involved in the study

to contribute to the research, including the researcher (Coghlan & Brannick, 2014, p. 6), and

acknowledges the fact that I am not an impartial observer, but rather have active role to play as a

member of the community which I am investigating.

Action research engagement model.

The ARE model focuses on the preliminary phase of an AR process, where stakeholders

are engaged in initial dialogue and meaning-making around a given topic (Rowe et al., 2013, p.

6). This inquiry into Canadian museum leadership was designed as an initial exploration of the

development of leadership for Canadian museums. As my first inquiry into this topic with the

CMA, ensuring that participants, including representatives from the CMA, were fully engaged in

the topic was critically important to the success of the inquiry over the long term. It is well

understood that a common reason for the failure of organizational change efforts is the lack of

true engagement from employees (Armenakis & Harris, 2009; Rowe et al., 2013). Where AR

focuses on multiple cycles of activity to achieve change, ARE is more focused on the necessary

stakeholder engagement that precedes change by involving stakeholders in an inquiry activity

that "opens them to different points of view; increases their understanding of issues; and

identifies challenges, barriers and opportunities" (Rowe et al., 2013, p. 7)—in an effort to pave

the way for actual changes in the future. ARE is intended to help stakeholders begin to plan for

the implications of change—and not effect the change itself—in terms of revising or generating

new strategic directions and plans for more sustainable change efforts (Rowe et al., 2013, p. 7).

As noted in Chapter 2, leadership is a relatively new conversation in museum discourse and,

while pressing, the importance of preparing the groundwork and moving forward thoughtfully

made ARE an appropriate model for use in this inquiry. ARE enabled me to focus my efforts on

engaging participants in the discussion about leadership development in Canadian museums, and

not the actual change required to develop that leadership.

Further, as I do not have any direct control over whether the recommendations put forward

by this inquiry's participants will be pursued by the CMA, using ARE was an appropriate model

to set the stage, engage participants, and set possible goals. ARE aligns well with initial

engagement required for a full AR methodology, which would require the CMA to move through

implementing the recommendations, and then pursuing additional cycles of inquiry, action, and

reflection demanded by a full AR methodology—such a process may result from this study, but

successful implementation could require several years. Nevertheless, in partnership with key

stakeholders, this inquiry undertook two cycles of investigation (interviews and a focus group

described later in this chapter), put forward suggestions for further action from the study

participants (see Chapter 4, findings and conclusions), and offered a way forward for future

cycles of action and learning (see Chapter 5, recommendations and inquiry implications). In

other words, I used the ARE model in an effort to spur a larger conversation about, and perhaps a

future AR approach to, leadership development for Canadian museums among Canadian

museum workers and the CMA.

Appreciative stance.

I overlaid my use of the ARE model with an appreciative stance because its use of positive

framing supports the focus on initial engagement embraced by ARE. I did not undertake a fully-

fledged appreciative inquiry, as I do not have any direct control over whether CMA would move

formally move through all the phases as put forward in the appreciative inquiry literature.

A full appreciative inquiry generally takes place in five phases: define, discovery, dream,

design, and destiny (Cooperrider & Whitney, 2005; Walling, 2013, p. 8). According to Walling

(2013), the first phase is focused on defining the inquiry in order to quantify its goals and also

attends to the language used to frame a project because how a project is framed "is critical to

what answers come in the subsequent steps" (Walling, 2013, p. 8). Walling (2013) defined the

remaining four phases as follows: the second, discovery, is about finding what already works

well; the third, dream, builds on what works well by envisioning a desired future; the fourth,

design, requires detailing the work necessary to manifesting the dream; and the fifth, destiny, is

the point at which you execute on the work to bring the vision to life.

According to Bushe (2005), an appreciative stance is predicated on the "ancient piece of

wisdom that whatever we pay attention to grows. It is as though simply paying attention to

something invests it with more energy" (p. 699). Bushe (2005) explained that appreciative

leadership requires cultivating an appreciative perspective on life, and focusing on what you

want to increase (rather than what you want to decrease), and that "you need to touch people's

imagination, aspirations, and spirit . . . [and create] opportunities to excel, make a difference . . .

be the best, make a better world, fulfill our dreams" (p. 699). Bushe (2005) believed that the

engagement required by change efforts is best created by inviting people to consider the future

they want to create, and that this is best facilitated through positive, generative conversation.

According to Cooperrider and Whitney (2005), seeking "what gives 'life' to a living system

when it is most alive, most effective, and most constructively capable in economic, ecological,

and human terms" (p. 5) is the process of appreciative inquiry. It is the idea of bringing focus to,

and building on, what works, instead of concentrating on deficiencies. In designing this study, I

believed participants would likely be more engaged in the topic if they were invited to consider

their positive experiences of leadership and to offer constructive suggestions for the development

of leadership for Canadian museums.

Approaching the inquiry with an appreciative stance offered many of the same benefits

associated with a full appreciative inquiry process, including "its deliberately positive

assumptions about people, organizations, and relationships", because it "leaves behind deficit-

oriented approaches to management and vitally transforms the ways to approach questions of

organizational improvement and effectiveness" (Cooperrider, Whitney & Stavros, 2008, p. 2)

and offers a means of encouraging the heart (Kouzes & Posner, 2007). A positive approach does

not mean ignoring the negative, because identifying the light necessarily also defines the

shadow, as Bushe (2012) described: the "invitation to focus on the positive and the act of

remembering high points in life can evoke sadness, anger and despair" (p. 16). This balance of

dark and light is critical, because it is important to see what *is* (Senge, 2006), in order to move to

forward to what might be. As an inquiry focused on an initial engagement with the Canadian

museum sector, this project did not move through a full appreciative inquiry process, but rather

adopted an appreciative stance, working with the principles of discovery and dream to inform the inquiry. This was done to bring a positive lens to the study, to focus on what currently works well, and to identify what might work well in the future in order to put forward useful recommendations for the CMA.

Inquiry Team

An inquiry team is a group of professionals who collaborate and share expertise to support an AR project, typically comprised of the primary researcher and several key representatives of the organization, or in this case, the sector under study (Rowe et al., 2013, p. 23). My inquiry team comprised three colleagues in Calgary, selected for their stated interest in the inquiry and their broad experience working in the Canadian museum sector. The team included: Alexandra Hatcher (Director of site operations for Alberta's historic sites and museums, and former Executive Director of the Alberta Museums Association), Lisa Making (Director of exhibitions and communications for the Royal Tyrrell Museum), and Crystal Willie (museum consultant). All served as test candidates for piloting the data collection methods, advised on relevant literature, and served as a first audience for the themes that emerged from the coded data. My inquiry team also included a CMA staff member who helped coordinate the focus group and board session (both of which are described below). All of my inquiry team members reviewed and signed the inquiry team member confidentiality agreement (see Appendix C for the inquiry team agreement).

Project Participants

As described below, this study made use of two data collection methods, interviews followed by a focus group, and all participants were Canadian museum workers.

Interview participants ranged from mid-level managers to senior executives, based on the following inclusion criteria: they were CMA members, had worked in museums for at least ten years, self-identified as having a desire to continue working in museums, considered themselves museum professionals, and expressed interest in leadership concepts (see Appendix D for the interview selection criteria). As the CMA was the sponsor organization, and the goal was to identify tools or activities the CMA could implement for members, it was reasonable that participants should be members. That they self-identified as museum workers was important as they were likely more vested in the outcomes of this work for the future of the sector.

It is important to note that the museum sector is not a licensed one, so professional identification is a matter of experience and self-selection (Janes, 2016, p. 366). That they had over ten years of experience was important to ensure they had a variety of experiences to draw on, and held informed opinions about the future. Further, I ensured at least one participant had over twenty years of experience to gain a long-term perspective on the issue of leadership.

Interview participants were selected using a combination of purposive and convenience sampling. Palys (2008) explained purposive sampling as identifying "the person or place or situation that has the largest potential for advancing your understanding and look[ing] there" (p. 699). Specifically, my second thesis committee member, the CMA, and my inquiry team used criterion sampling (Palys, 2008, p. 698) to help me identify a list of approximately 20 potential participants we believed met the participation criteria outlined above and who had the largest potential to comment on leadership for the future of museums in Canada.

The final list comprised 23 individuals whom I invited to participate (see Appendix E for the interview letter of invitation). Their participation was then effected through convenience sampling (Saumure & Given, 2008) based on the first six candidates to volunteer in response to

my invitation. Though there were thousands of potential participants, given the number of

museum workers in Canada, I only interviewed six museum workers because, as Robinson

(2014) noted, researchers undertaking interpretive qualitative studies should follow a "guideline

of 3-16 participants for a single study . . . [as] this sample size range provides scope for

developing cross-case generalities, while preventing the researcher being bogged down in data"

(p. 29). Thus, six interviews, in addition to the focus group participants, provided ample

qualitative data for the scope of the project.

Focus group participants included all CMA staff members available in person on the date

of the session at their offices in Ottawa (there were 17 of 24 staff), and their inclusion was

simply based on their status as current employees, and that they were willing to participate based

on their free, informed, and ongoing consent. The focus group did not include my project

sponsor, CMA Executive Director, John McAvity, as he had power-over all potential

participants. In other words, his position of authority over all potential participants would not

have ensured free (i.e., voluntary) participation as is required by the Tri-Council's Research

Ethics guidelines and RRU's Research Ethics Board. As a CMA member and a peer of my

participants, I did not have any organizational power-over any of the participants, so our various

relationships did not present any ethical concerns related to power (discussed further in the

ethical issues section below).

Inquiry Project Methods

    Data collection methods.

The project began with six, one-on-one interviews held in-person where possible, or by

online video-conferencing. Nehls, Smith, and Schneider (2015) noted that face-to-face remains

the "gold standard for interviews" (p. 141), but that the use of online video conferencing

software is so prevalent now that participants do not require instruction, and are quite

comfortable using it. The major advantage of online interviews is they enable participation from

across the country and eliminate the need for travel. While I could have used the telephone,

Nehls, Smith, and Schneider (2015) found that

> in comparing telephone and video-conference interviews, we found video interviews to be
>
> superior to telephone on many levels . . . the face-to-face nature of the video-conference,
>
> even in different locations, made the entire interview seem more personal and natural.
>
> (p. 152)

Further, participants are given the flexibility and comfort of choosing their preferred setting for

the conversation. Interviews afford the opportunity to learn about participants' "experiences,

perceptions and explanations" (Glesne, 2016, p. 97) in a way that observation or survey methods

do not. Among other factors, interviews are also an advantageous method when anonymity is not

an issue (but confidentiality might be), and generating insight and understanding at a deeper

level was important to the inquiry (Gillham, 2000, p.11).

  I used a semi-structured interview format, which gave me the "freedom to pursue the

questions in a different order and to allocate more time to some questions than to others

depending on what is most appropriate for discussing the research topic with each individual

participant" (Morgan & Guevara, 2008, p. 470). Using open-ended questions also gave

participants the freedom to choose the terms they wanted to use to answer questions, and to

highlight what was meaningful for them (Roulston, 2008). As described above, I also used an

appreciative stance in the questions, in that I framed questions positively and asked for examples

of good experiences and successful leadership approaches within the participants' work in

museums (see interview guide in Appendix H). By focusing on positive experiences and "what is

already successful . . . [the interviews] enable the emergence of generative thinking and

solutions" (Coghlan & Brannick, 2014, p. 47). Approaching the interviews in an open-ended,

appreciative way was intended to increase participants' engagement with the questions.

The interviews were followed by a focus group with CMA staff. According to Krueger and

Casey (2015), a focus group has five key aspects: "(1) it is a small group of people, who (2)

possess certain characteristics, (3) provide qualitative data (4) in a focused discussion to (5) help

understand the topic of interest" (p. 6) Further, focus groups are "particularly useful in action and

evaluation research" (Glesne, 2016, p. 123), as they enable participants to hear each other's

comments, which will likely offer diverse perspectives and build consensus around key ideas or

issues (Litosseliti, 2003, p. 16). Litosseliti (2003) also summarized various drawbacks to

working with focus groups, including: the danger of leading participants, the possibility that

participants will only say what they think you want to hear, that those with strong personalities

and/or similar views may dominate the discussion, that groups sometimes appear more consistent

than they are because individuals who disagree may not say so, as well as the various challenges

posed by situational factors such as sample size and meeting conditions.

Although these concerns are valid, they were balanced by the overall goal of engaging

CMA staff members in a group discussion of the inquiry questions, as well as major themes and

suggestions generated by the interviews. The intent of the focus group was twofold: to generate

additional data and to contribute to a sense ownership of and vested interest in the discussion and

recommendations as CMA staff members will likely be responsible for the implementation of

any next steps as may be endorsed by the board and the Executive Director.

Study conduct.

Following the Royal Roads University ethics approval process, I began the inquiry with a review of the proposal and timeline with CMA Executive Director, John McAvity, and CMA staff members. The next task was to share the invitation and information letter with the potential interview candidates (as identified above), asking them to respond by a set date if they were interested in participating (see Appendix E for the interview letter of invitation, and Appendix F for the corresponding information letter, sent by email).

I also engaged my inquiry team members at this time by pilot testing the data collection methods (both the interview and the focus group) with them. Following the study pilot, I adjusted the interview guide for length and clarity of language. I also continued the literature review, as Glesne (2016) recommended that "literature should be read throughout the research, including a thorough search before data collection begins" (p. 34). I did this to ensure that my listening was well-informed by current writing on the subject during data collection.

On the closing date of the interview invitation, I followed up with those participants who expressed an interest in participating and confirmed they met the criteria (see Appendix D for interview selection criteria). Once I finalized the participant list, I ensured the interview candidates understood the process, completed the consent form (see Appendix G for the interview consent form), and confirmed interview times for June 2016.

Interviews were 50 minutes (recorded) and I asked participants to discuss their experience of leadership and their vision for Canadian museums ten years from now (see interview guide in Appendix H). I then transcribed and anonymized the interview data myself to deepen my familiarity with it. I coded the data and reviewed the major themes and ideas that emerged with my inquiry team. By reviewing the major themes and ideas with my inquiry team,

they were able to provide input into the design of the conclusions and also recommend additional relevant literature.

Following the interviews, I held the focus group with CMA staff in early October at the CMA's Ottawa offices (see Appendix I for the focus group letter of invitation, Appendix J for the focus group consent form, and Appendix K for the focus group guide). CMA staff members were invited to respond to the same interview questions, to build on the key themes that emerged from the interviews, to respond to key ideas and themes from the literature, and to identify potential actions that could be undertaken by the CMA and/or promoted among its member institutions to develop leadership among the members. Reminding participants of the task at hand, and establishing the scope of the study at the outset of both interviews and the focus group, was one way in which I worked to establish the trustworthiness of my process and the data collected.

Following the interviews and the focus group, I held a session with CMA board members (see Appendix L for a list of current CMA board members) to share the major themes and ideas which emerged from the research, discuss what actions the CMA (and its member institutions, including their own) might undertake, and to identify any relevant next steps, as board members will have the responsibility to champion those projects or activities which may emerge from this project. Note that this session was not a formal data collection method, but rather a means of engaging with the CMA to support organizational change. Further, as most board members are executive directors, they also have the capacity to implement changes in their own institutions independently of CMA if they so choose.

Data analysis.

Following the completion of the interviews and the focus group, I undertook the data analysis. I used what Ritchie and Lewis (2003) described as a framework analysis, which is a matrix-based method designed to facilitate understanding the data according to key themes. This is done by breaking the work into two phases, "the first requires managing the data and the second involves making sense of the evidence through descriptive or explanatory accounts" (p. 219). In other words, interpretation follows organization.

As noted by Ritchie and Lewis (2003), "qualitative 'raw' data comes in various forms, but most commonly comprises verbatim transcripts of interviews or discussions (or audio tapes if they have not been transcribed), observational notes or written documents of other kinds" (p. 221). Data management involves spending time with the data, reading and re-reading to identify initial themes or concepts, then organizing these themes into an index of labels, followed by reviewing the data and tagging discrete pieces with the relevant index labels (Ritchie and Lewis, 2003, p. 222). Indexing is also sometimes described as coding the data (Glesne, 2016).

To manage the data, I transcribed the conversations verbatim from the audio recordings. I did the work myself in order to build familiarity with it, and to aid the process of identifying relevant and useful codes, which Glesne (2016) defined as words or short labels used to identify certain recurring themes or ideas in the data. Following the transcription process, I developed a series of codes based on themes that I heard repeatedly during the transcription process (for example "love of learning" and "community engagement") and applied them to the data, building a framework and plugging in both interview data and my own notes from the interviews. The final stage of data management involved summarizing the themed data under four overarching findings, as explored in detail in Chapter 4. Ritchie and Lewis (2003) suggested

using a large chart to do this. To create my chart, I initially plotted each participant answer in a

grid below each question, colour coded for each participant and my own notes. Then I cut and

pasted the text into the relevant thematic sections of the chart as grouped by the index.

The second phase of data analysis involved analysing the developing patterns among the

concepts and themes to seek wider meaning among the participant data (Ritchie and Lewis,

2003). Here, it was important to remember Glesne's (2016) point that "no one right way exists to

make sense of your data" (p. 211). However, sharing the analysis via peer review is one way to

assist in the interpretive work and to establish trustworthiness of the data (Glesne, 2016, p. 212).

Accordingly, I shared my anonymized and themed data, as well as the initial findings, with my

inquiry team (described above), thesis supervisor, and second thesis committee member to help

refine my interpretation of the data. Ritchie and Lewis (2003) affirmed that refinement, and

sometimes the creation of new codes or the reorganization of themes, is a normal and important

part of the analysis process.

Validity.

In quantitative research, reliability and validity are all about repeatability and ensuring the

measurement tools are accurate, whereas in qualitative research, "reliability and validity are

conceptualized as trustworthiness, rigor and quality" (Golafshani, 2003, p. 604). It is about

answering a broader question: "Are these findings sufficiently authentic . . . that I may trust

myself in acting on their implications?" (Lincoln, Lynham & Guba, 2011, p. 120). Creswell and

Miller (2000) made the point that "qualitative inquirers need to demonstrate that their studies are

credible" (p. 124). To establish qualitative credibility, Lincoln et al. (2011) broke this task into

two elements; they claimed that validity is derived first from the rigorous application of the

method, and second from a shared understanding between the writer and the reader of the

paradigm they share, and the way they view the interpretation of results. According to Lincoln et al. (2011), this second element demands that we ask whether "our findings point to action that can be taken on the part of research participants to benefit themselves or their particular social contexts" (p. 120). To establish validity in this inquiry project, I attended to both of Lincoln et al.'s (2011) metrics for validity. I was careful in the application of the methods as described in both the data collection methods and study conduct sections above, and I made my best effort to offer a brief, yet transparent explanation of the manner in which I interpreted the results in the data analysis section above.

It is also important to disclose bias because it is a means of demonstrating trustworthiness on the part of the researcher, which in turn builds the validity of the research (Creswell & Miller, 2000, p. 127). Here it is important to recall that since researchers' values are embedded in the topics they choose and in the questions they ask, it could be argued that all research is, in a sense, biased. As Hammersley (2005) emphasized, "it is argued that all accounts of the world reflect the social, ethnic, gendered, etc. position of the people who produced them" (p. 156). Given this perspective, I acknowledge that there were two likely sources of bias in this inquiry: mine, and the self-selection bias generated by those who volunteered to participate.

My bias comes from my interest in and experience with museums. As Mehra (2002) explained, the closer a researcher is to the topic and the population involved in an inquiry, including researchers belonging to that population themselves, introduces bias into the study. To mitigate bias, as recommended by Chenail (2011), I piloted the methods to test my questions with my inquiry team. I also endeavoured to make my values clear. Creswell and Miller (2000) underlined the importance of researcher reflexivity and defined it as "the process whereby researchers report on personal beliefs, values, and biases that may shape their inquiry" (p. 127).

Thus, throughout the process I explained to participants that my interest in the study was rooted in my experience working in the museum sector, and in my wish for museums to be successful and self-sustaining.

A second source of bias may have come from what Robinson (2014) explained as the self-selection bias created by those who volunteered to participate in the study (as compared to those who did not volunteer). Robinson (2014) explained that

> the self-selection bias is not possible to circumvent in interview based research, as voluntary participation is central to ethical good practice, therefore all a researcher can do is be aware of the possibility for bias and consider its possible impact on findings. (p. 36)

It is likely that those who wanted to participate in this study were keenly interested to learn more about museum leadership and more inclined to take related action, which could lead to the positive reception of the findings and conclusions, and support for action as put forward in the recommendations.

Ethical Issues

In Canada, research ethics are guided and upheld by the *Tri-Council Policy Statement: Ethical Conduct for Research Involving Humans*, a joint policy built on three core principles: "respect for persons, concern for welfare, and justice" (Canadian Institutes of Health Research, Natural Sciences and Engineering Research Council of Canada, & Social Sciences and Humanities Research Council of Canada, 2014, p. 6). Respect for persons is about demonstrating that each human is inherently valuable by respecting individual autonomy, and protecting those whose autonomy may be developing, impaired or diminished (Canadian Institutes of Health Research et al., 2014, p. 6). In this study, participants' autonomy was respected by ensuring that

they understood they were free to choose to participate or not, and further, if they chose to, that they were also free to leave the study at any time with no consequences.

To mitigate any possible perceived conflict of interest, I noted in the inquiry information letter (see Appendix F) that I worked for the CMA at one time. I reminded participants of my past employment, confirmed that I no longer worked there, and that I undertook this study independently without compensation. I ensured that all participants had access to all of the relevant information about the study, such that their participation was governed by their free, informed, and ongoing consent.

The second core principle, concern for welfare, refers to "quality of life in all its aspects" including the physical, emotional and socio-economic; it further comprises "privacy and control of information about the person" (Canadian Institutes of Health Research et al., 2014, p. 7). I ensured that data collected from individuals remained private and secure per my information letter (see Appendix F), and I maintained confidentiality regarding participation insofar as it was possible for each method. I was able to maintain complete confidentiality regarding participation for interview participants, as only the participant and I know they have been interviewed. Due to the nature of the focus group method, confidentiality regarding participation was not possible. However, participants were asked to respect privacy by not sharing identifying information. Furthermore, all data were anonymized in transcription and, where quoted in the report, is non-attributable.

The third principle, justice, is about ensuring all people are treated with equal respect and concern, and ensuring both the benefits and risks associated with research are fairly distributed among participants (Canadian Institutes of Health Research et al., 2014, p. 8). I fulfilled this principle by treating all participants—whether museum director or mid-career manager—with

equal respect and gratitude for their willingness to contribute. Further, I ensured that there was a balance of participation across different responsibility levels, and the other selection criteria identified in the section on participants above (see Appendix D for the interview selection criteria). Finally, by keeping the staff focus group separate from the session with board members and the sponsor, I eliminated the possibility of power-over issues between those two groups.

Demonstrating my understanding of these ethical considerations to my participants was a direct means of fulfilling my ethical and humanistic obligations as a researcher. Patton (2015) identified ten "humanistic principles undergirding qualitative inquiry" (p. 234) that comprised the same core values as the Tri-Council Policy Statement, and expanded them to include values statements on the importance of transparency, open and honest communication, and respect for human emotion and person-centredness. Patton (2015) went on to state that the researcher must be "non-judgmental, accepting, and supportive in respecting others' right to make their own decisions and live as they choose" (p. 234). To do this, the researcher must adopt "empathic neutrality as a stance [which] expresses deep interest in people's experiences, perspective, and stories but is neutral (nonjudgemental) about content" (Patton, 2015, p. 234). I endeavoured to manifest these considerations by ensuring volunteers who participated did so based on their free, informed, and ongoing consent.

Chapter Summary

This chapter introduced the design of this inquiry, and included an exploration of the AR methodology, the participants, the project methods used (including data collection methods, study conduct and data analysis), and the ethical issues that I was responsible for mitigating as I investigated questions related to fostering leadership development in Canadian museums. The

following chapter describes the inquiry project findings and conclusions that resulted from the

processes described above.

Chapter 4: Inquiry Project Findings and Conclusions

This chapter begins with a restatement of the main inquiry and sub-questions, followed by a summary of the major findings, which are each explored in turn. Following the review of the findings, this chapter closes with a summary of the conclusions and a brief review of the scope and limitations of the inquiry.

The main question I sought to investigate, with the support of the CMA, was "How might the CMA facilitate leadership development among its members?" The sub-questions were as follows:

1. What stories of leadership success do members of the CMA tell?

2. What vision do CMA members have for Canadian museums 10 years from now?

3. What kind of leadership do Canadian museums need to realize that vision?

4. How might the CMA develop this leadership in Canada?

As detailed in the methodology in Chapter 3, I investigated these questions through interviews and a focus group with museum workers from across Canada. I interviewed six participants, who each met the following inclusion criteria: they were CMA members, have worked in museums for at least ten years, expressed a desire to continue working in museums, considered themselves museum professionals, and expressed interest in leadership concepts. I invited 23 individuals to participate (17 women and six men), and received 13 positive responses and two negative responses. My final group of participants included five women and one man in senior leadership positions from a range of museums, including two national crown corporations, two provincial museums, and two smaller regional museums. The participants ranged in age from their early 40s to their late 50s, and were based in Ontario, Quebec, Alberta, British

Columbia, and the Northwest Territories. To maintain their anonymity, they are numbered as participants I-1 through I-6, and I have avoided gendered pronouns.

Following the interviews, I conducted a focus group with CMA staff members in which I asked the same interview questions and also tested the emergent themes from the interviews. To maintain their anonymity they are numbered as FG-1 through FG-17.

Through the interviews, and the focus group, four major findings emerged:

1. Participants valued learning and sharing learning.

2. Participants shared a vision of strong community relationships and meaningful social impact for museums.

3. Participants believed museum leaders require specific values and abilities to achieve this vision.

4. Participants offered practical ideas to develop leadership for Canadian museums.

These findings informed the study conclusions, as follows:

1. Nurturing self-leadership will strengthen Canadian museums.

2. Canadian museums should operate in service to community.

3. Canadian museum leaders require specific expertise and values.

4. There are concrete actions the CMA could take to develop leadership for Canadian museums.

The study findings and conclusions are explored in more detail below, followed by a brief review of the scope and limitations of the study.

Findings

Finding 1: Participants valued learning and sharing learning.

To investigate my first sub-question, "What stories of leadership success do members of the CMA tell?", I asked participants to speak about what brings them joy in their work, what they look forward to in their careers, and about their positive experiences of leadership.

The six interview participants each spoke of the personal joy they draw from their work through exploring new ideas, understanding complex issues, and sharing that learning with others. One participant beautifully expressed their personal value of learning and influencing others:

> For me, I love the ability to learn every single day—to feel like you're progressing as an individual—being always on the learning path brings me the best fulfillment—[you're] never on automatic pilot, you always have something to learn and something to share. For example, a security guard told me the other day that he sees me riding to work and he realized, if the director can ride a bicycle to work, then why can't I? (I-2)

The participant continued: "Looking back over my career, I have been engaging larger and larger groups of people . . . I love influencing people to the better" (I-2). The theme of sharing personal learning was also emphasized by a second participant: "One of the major sources of joy for me in my work is the joy of opening people's eyes to different ways of doing things" (I-1). The joy of continuous learning surfaced in the focus group as well, where many participants echoed this as a self-improvement value they shared (FG-2, FG-4, FG-5, FG-9, FG-11, FG-17).

Two other interview participants echoed this sense of personal joy in learning—but they connected it more directly with community; as they noted respectively: "My biggest joy is continuous learning within my own culture" (I-5), and "I'm always learning something new

about my community and bringing that to the forefront—about issues and ways of delivering information" (I-3). This participant further noted that it takes significant effort to stay abreast of community issues, and suggested getting the necessary information from local sources, such as public policy think tanks or social service agencies. Here we see a link between the joy of individual learning and the act of sharing learning with a larger community.

Many of the focus group participants work to deliver Young Canada Works in Heritage, a government of Canada funding program that creates summer museum jobs for students. One of the focus group participants noted their particular joy in learning about organizations across Canada, meeting new museum workers, and then creating learning opportunities for them at the early stages of their careers, right across the country (FG-13).

In speaking of the joy in their work, and what they look forward to, all participants were retelling experiences of positive leadership: of their own self-leadership through learning for their own joy and benefit, and of organizational leadership through sharing learning with others in their organizations and their communities. For many participants, their personal values of learning and sharing learning were directly connected to successful leadership opportunities for their organizations within their communities.

In answering the sub-question, "What stories of leadership success do CMA members tell?", all participants (I-1, I-2, I-3, I-4, I-5, I-6; many focus group participants) were keen to share stories of positive leadership. Interestingly, four of the interview participants cited examples of their own leadership (I-1, I-2, I-3, I-4), and the positive effect they have had both on themselves (through self-leadership) and on others in their careers. One participant spoke of the value of the opportunity they were given to take a management course from a local college (I-6). Another two interview participants spoke to examples of leadership (I-5, I-6) in terms of their

museum's organizational impact in their community. For example, one participant spoke of the capacity of their museum to be an active participant in social justice issues facing their community (I-5). Another participant spoke of the capacity of their museum to share their learning about seniors' quality of life through delivering community programs for seniors (I-4).

Focus group participants spoke of leadership in terms of others' leadership, associating positive leadership with two key themes of this project: those with a clear vision for the future focused on museums and the impact they can have, rather than those driven by politics or a personal agenda (FG-17), and those who engage and empower others in an effort to help others learn and grow (FG-4, FG-5, FG-9).

The data revealed that participants valued learning opportunities for themselves and others, through reflexive practice and external learning opportunities. They also valued the positive impact of sharing learning through their organizations with their communities. Participants also valued learning about issues outside museums, and again, sharing that learning with the larger community; note this is reflected in more detail in the recommendations in Chapter 5.

Finding 2: Participants shared a vision of strong community relationships and meaningful social impact for museums.

To investigate my second sub-question, "What vision do CMA members have for Canadian museums 10 years from now?", I asked participants to describe the ideal future they envision for Canada's museums. In expressing their vision for museums ten years from now, all interview participants spoke of the fundamental importance of strong community relationships with a view to increasing the public's understanding of, and engagement with, complex social issues (and notably, not their respective museum collections). The opportunity to have impact, whether on another's career, public knowledge, or the future of society, appealed to all interview

participants (I-1, I-2, I-3, I-4, I-5, I-6). As one noted, "we're changing the future by creating a greater understanding of our cultural and natural world and how to live in balance with it" (I-1). A second interview participant expressed this connection to community as an urgent mission:

> Museums' most important work is our ability to take complex issues and make them accessible, digestible . . . my vision for museums is that they will become connectors—connecting the general public to complex societal issues in a way that's understandable and democratic, and to the behind the scenes work of non-profit organizations working for the betterment of their communities. (I-3)

The idea that museums can offer a platform for other organizations to step forward and demonstrate their public value ran through many of the interviews; one participant hoped this would lead to greater public support for other social service organizations within their community (I-3). Participants felt that creating support for other organizations was a generous and community-oriented way to generate social impact.

A vision of strong community relationships requires community-oriented values, such as access, diversity and inclusivity, which were voiced by many of the interview participants. As one participant stated, "Where I'd like to see museums blossom is in creating dialogue, debate and a levelling of the playing field with . . . marginalized populations. To move away from elitism and to become a strong tool of positive change, and to provoke thought" (I-5). Community-oriented values also surfaced in the focus group discussion in terms of the importance of diversity regarding both topics addressed by a museum (FG-4), as well as the diversity of staffing. One participant felt there was a long way to go to in the sector "to ensure more diverse social representation among staff" (FG-11). It is noteworthy that participants

demonstrated an understanding that museums have the opportunity to address social issues both as topics for content development and in the way they operate.

Several participants put forward the idea that modelling values is the primary function of museums in society. Participants tended to focus on values such as accessibility, multiple perspectives, and critical thinking. One participant described the amplifying effect modelling values can have, as they explained: "values are what you give the public—empathy, love, generosity, humility, curiosity—your values inform your projects, [which] inform your institution, [which] inform your community" (I-4). Modelling values and having an impact resonated strongly for focus group participants, where the discussion centred on the need to be in touch with the public—even in simple ways such as being present in exhibition and program spaces on a regular basis (FG-2). An interview participant summed up their vision of community service and engagement for museums in one question: "How are we making a difference in the world?" (I-6). These comments demonstrated that participants shared a vision of strong community relationships and meaningful social impact for museums.

Finding 3: Participants believed museum leaders need specific values and abilities.

To investigate my third sub-question, I asked participants "What kind of leadership do museums need to realize the vision?". To make a difference in their communities, and the world at large, the participants spoke to the specific values and abilities they believe museum leadership must possess to be successful, as follows:

- a deep curiosity and broad interest in the issues of contemporary life,

- an openness to risk and trying new things, and

- a specific understanding of and knowledge about how museums work.

The first and second findings identified earlier in this chapter—the value of learning and a vision of strong community relationships for meaningful social impact—could also be construed as strong values that museum leadership must possess, given most participants spoke to them in terms of values. For participants, strong community relationships were founded on and informed by a deep curiosity about the world we live in and a deep awareness of the complex systems that underlie all things. One interview participant spoke to this with some urgency:

> We need cultural workers who learn about all sectors of society, and how we can be a catalyst for connecting all the disparate [economic, social, environmental] pieces and make sense out of it—it's hugely challenging, but cross-fertilization is something we proactively, consciously need to address. We have to broaden our point of view or we're just going to become completely redundant if we aren't teetering on that edge already. (I-6)

Connection to global issues was echoed by all participants in both interviews and the focus group, as one noted: "You must be interested by your world, you have to be connected to current social, and political issues, you must seek relevance in your world where you live everyday" (I-4). As another put it more bluntly: "If you don't have an appreciation of what's going on in Canada, how can you do your job properly?" (I-2). To understand "what's going on" requires a willingness to learn, curiosity, and a broad interest in the issues of contemporary life.

For participants, curiosity about the challenges facing the world was critically important—but it was not enough in itself—it was coupled with the need for an openness to take action in response to these challenges. Several interviews participants discussed the importance of openness to risk (I-1, I-2, I-3, I-4). As one participant said, "leaders need to be open, so they can foster innovation and experimentation, they need to have comfort with risk regarding debate and dialogue. Comfort with risk leads to experimentation—which implies failure—but this leads to

innovation" (I-4). Openness was a key discussion point in the focus group, and several

participants (FG-5, FG-11, FG-12) agreed that "everything" has to be open. For example, that the

democratization of access (through digitising exhibitions and collections online) can create new

opportunities for collaboration and new stories.

Opening up to public debate and dialogue may necessitate that a museum take a stand on a

given issue—although the attempt to remain neutral is, in effect, taking a stand (Freire, 2005, p.

34). Actively taking positions is not something museums are historically known for because of

the sector's belief in "authoritative neutrality" (Janes, 2009, p. 59) and the perceived risks of

possibly alienating stakeholders, such as the general public or funding agencies. But as one

participant stated, "museums sorely, sorely need exposure to risks with programming" (I-3), they

continued: "if we help people reach a new understanding of homelessness, what are we doing

afterward to keep people connected to museum work and to continue to do good?" (I-3).

To open museums to issues of public debate, both interview and focus group participants

talked about the specific skills and abilities that museum leaders need. Two participants spoke

specifically to the need for museum leaders to be generalists (I-2, I-4), which aligns with the

need to have a broad curiosity about contemporary issues and the specific ways those issues

impact their own communities. Nonetheless, participants balanced this need for a broad interest

against the importance of specifically knowing museum work; one participant emphasized the

need for this balance of broad curiosity and museum expertise convincingly:

We need to have people working in museums who *actually know* what the business is all

about! How often do we hire people in the museum business that have had very little to do

with museums? There are so many examples in Canada of people coming to take charge of

a museum and their profile is that for the last ten years is that they've been good at raising

money in a hospital. Therefore, they should be good at raising money in a museum?

What?! So perhaps in my next job I should look for a hospital job? . . . We need leaders

who know what they're talking about—but who also have a very large perspective on their

field. One of our weaknesses is that we tend to be highly specialized in one area—but we

need to understand society broadly so we understand how to position our institutions

properly. (I-2)

The recognition that the business of running a museum requires a specific skill set was repeated

in the focus group, as one participant stated, " We have to have an honest conversation about

leadership—we need to recognize soft skills and other competencies that are specifically relevant

to museums" (FG-11). The specific competencies that surfaced in the interviews were a balance

of the following: intellectual and subject matter expertise (I-2, I-4); business and financial

literacy (I-1, I-6); the ability to build cross-sector partnerships (FG-2, FG-4, FG-11, FG-17); the

capacity to be curious and ask questions about everything ("a museum leader is by essence a

generalist" [I-2]); cultural and emotional intelligence (I-1, I-2, I-3, I-4, I-5, FG-2, FG-4); and

specific knowledge of museum operations (I-2, I-4, I-6).

Museum management is complex (Falk & Sheppard, 2006, p. 190; Janes, 2009). It

demands a high level of intellectual curiosity, strong values, and a keen interest in the world.

One participant explored the connection between confidence as a required aptitude for museum

professionals, and the impact that can have on the success of an organization:

Museum professionals need to be more confident in themselves, and in turn this will breed

confidence in our institutions. We *do* have something important to offer. Confident means

you have conviction that what you're doing is essential for society. And if you're unsure

then don't expect society to be there for you—if you're not convinced yourself it's going to be very hard to convince other people. (I-2)

Here, the participant drew a connection between confidence, and the impact it can have—both in terms of audiences and fundraising (although fundraising was only implied). The implication is significant: museums today must generate revenue. A second participant made a more explicit connection between relevance and operating like a business (I-1), explaining that being connected and relevant to the world was a means of ensuring financial stability.

In sum, participants believed that museum leaders need to have specific values and abilities to be successful, including: a deep curiosity and broad interest in the issues of contemporary life, an openness to risk and trying new things, and a specific understanding of, and knowledge of how museums work.

Finding 4: Participants offered practical ideas for developing Canadian museum leadership.

The fourth sub-question, "How might the CMA develop this leadership for Canadian museums?", was designed to follow from the second and third sub-questions, which asked participants to express their vision for the future of Canadian museums and the leadership required to manifest it. To investigate the fourth sub-question, I asked participants about what kind of professional development opportunities might help foster the specific museum leadership required to realize their vision of strong community relationships and meaningful social impact.

Participants offered the following ideas to help the CMA develop leadership for Canadian museums.

Foster openness and nurture development internally.

A major theme in the responses was the need to foster openness (I-1, I-2, I-3, FG-7, FG-8) and cultivate leadership internally: "we need to learn to nurture people" (I-2). As one interview participant suggested,

> We should encourage more peer-to-peer candid conversations. The tech sector does it well, see Communitech.ca, for example. We need to be generous with the learning from our mistakes, because everyone makes them, but this would give permission to make them and ask for help. CMA could facilitate this and I would participate. (I-1)

The participant went on to note that the popular "learning from our mistakes" session at the annual CMA conference is "superb, but we need this more than once a year" (I-1). The benefit of more open attitudes, and a willingness to share learning resonated strongly in the focus group, where one participant highlighted the importance of reciprocity in learning: "We need people who are open and willing to teach, but we also have to want to learn" (FG-3). The participant explained further that sometimes fear of job loss through replacement of the person they are teaching leads to lack of knowledge transfer which, in turn, hampers others' ability to move forward (FG-3).

There was discussion in the focus group about the hierarchical organizational structures of museums, and how that often leads to younger workers feeling left out or disconnected (FG-12). Learning to cultivate leadership internally is important for engagement; one participant shared a story of working in a museum where the executive director "spoke to everyone—even stuffed envelopes with me, as an intern. They valued everyone's contribution and made me feel like I was 'in on it'" (FG-12). A second focus group participant spoke to the importance of cultivating leaders internally by sharing a story from their experience, in which younger workers (or those

newer to the field) were invited to sit in on senior planning sessions as a learning opportunity

(FG-9). This effectively (and inexpensively) cultivated a spirit of openness within the

organization, served as learning opportunity for the younger employee, and built engagement in

the larger strategic vision for the organization.

Create new learning opportunities.

Several participants suggested creating professional internships as a means to developing

leadership for Canadian museums. As one interview participant from a national museum

explained:

> It would be interesting to think of professional or leadership development in a sequential
>
> way: community, municipal, provincial, national. If we're all publicly funded, then why
>
> not build an ecology of professional development? Could we envisage a system where the
>
> bigger help the smaller? We have an internship program for students, but nothing for
>
> professionals. Why doesn't my organization have a professional development opportunity
>
> for professionals to come and spend five or six months in our institution to learn? Then we
>
> could send our staff to smaller organizations where they would gain invaluable learning,
>
> new relationships, and different perspectives. (I-2)

The focus group responded positively to this suggestion and expanded on it by suggesting

internal internship pairings in which younger employees could learn from senior employees and

vice versa, emphasizing the value of two-way learning opportunities (FG-2, FG-9). It is

interesting to note that both of these suggestions were located within museums; as one

participant noted "we don't need more university programs" (I-2), but no participants suggested

internships or working with organizations other than museums, in spite of their belief that

museums need to cultivate stronger community relationships.

There were several other suggestions around creating new opportunities for learning, including larger travel bursaries and funding for experiments. As one participant noted, travel bursaries need to be bigger, because new experience "needs to be more than provincial or Canadian in scope" (I-3) (note that current professional development bursaries from CMA top out at 50% of costs or CAD $1,500 [Canadian Museums Association, 2014, Bursaries]). The same participant suggested that the

> CMA could develop small series of projects for communities, and then provide funds to museums to try them in three phases: idea generation, test or implementation, and scaling it up and out to increase impact. For each phase, CMA would provide 50% of the funds, and it would be okay if you failed. The Vancouver Foundation recently restructured all of their funding in this way. (I-3)[3]

The focus here would be to get museums to work with other organizations in service to larger community goals.

Changes to the conference.

Two of the interview participants offered suggestions for improving the annual CMA conference, directed towards increasing leadership development for community-connected museums. One suggested a conference theme focused explicitly on community development, inviting professionals from other sectors to participate (I-3) as a means of connecting museum workers and inspiring them. A second participant noted

> While the CMA conference is important (it's a big event, and lots of people go) so much of it is practical and not academic or reflexive. I would like it to be more balanced, and less

---

[3] Janes (2013) wrote about the need for a conversation about risk capital for arts organizations in the first edition of *Museums and the paradox of change* (p. 162).

like a tradeshow. We need to create more opportunity for critical analysis and debate; we

need to encourage discussion. (I-6)

The issues that participants offered as topics for more investigation ranged from collective

impact theory (I-3) to the environment (I-2, I-3, I-6), to gender (FG-7, FG-17): "there is still a

glass ceiling of privilege for white men in museums" (I-6), to diversity of the workforce (FG-7,

FG-17), and strong community relationships (I-1, I-2, I-3, I-4, I-5, I-6, FG-2, FG-4, FG-8, FG-9,

FG-17).

To conclude, participants offered a number of concrete suggestions to help develop

leadership for Canadian museums, ranging from fostering openness and nurturing development

internally, to creating new external learning opportunities as well as encouraging the annual

CMA conference to engage other sectors and to adopt a more research-informed approach to

encourage reflexive and critical discourse.

Study Conclusions

In an effort to answer the inquiry question and sub-questions, I conducted interviews and a

focus group. The findings from participant data as explored earlier in this chapter resonate

directly with the major themes identified in the literature review in Chapter 2.

Conclusion 1: Nurturing self-leadership will strengthen Canadian museums.

For all participants, regardless of the level at which they worked, the opportunity for

continuous learning, and sharing that learning, was a great source of joy (I-1, I-2, I-3, I-4, I-5, I-

6, FG-2, FG-4, FG-5, FG-9, FG-11, FG-17). Many participants associated learning with the

opportunity to have an impact, whether on individual peers (I-1, I-2, FG-13), within their

organizations (1-2, I-3, I-5), or across their communities (I-4, I-5, I-6). The extent to which this

love of learning can be generalized to the wider museum work force is unknown; however

participants in this study indicated that they love to learn, and Senge (2006) clearly stated that

learning organizations are successful. Thus, actively providing museum workers opportunities to

learn about leadership, and to expand their personal mastery will in turn strengthen museum

organizations. As personal mastery is the art of continuous life-long learning (Kouzes & Posner,

2007), museums workers who are continually learning about themselves and the world around

them will grow in their museum careers.

In turn, this should help the sector address the succession gap that is looming (Alberta

Museums Association, 2007, June; Baldwin & Ackerson, 2006)—which some museums in

Canada are currently addressing by sourcing leadership elsewhere (Sandals, 2016). If museums

develop leadership at all levels in organizations and move away from hierarchical models

towards those that distribute responsibility, they will be able to empower workers across

organizations and generate a larger pool of talent to draw from for succession planning.

Museums are inherently learning organizations, and this does not need to be limited to

creating learning opportunities for public visitors. As discussed above, a major theme of the

findings was the individual joy that all participants gained from continuous learning. As noted in

Chapter 2, the importance of continuous learning and reflexive practice as a means to improve

the self is a powerful leadership tool (Jackson & Parry, 2011; Pless, 2007; Senge, 2006; Short,

1998; Wheatley, 2007). Senge (2006) strongly maintained that of the five core attributes of

learning organizations, personal mastery (or self-leadership) is the most important: "individual

learning does not guarantee organizational learning, but without it, no organizational learning

occurs" (p. 129). In their study of museum leadership, Ackerson and Baldwin (2014) identified

self-leadership training, at all levels in organizations, as the most critical and therefore highest

priority action museums should take:

First, the field needs to embrace and understand the importance of individual leadership

training. When leadership takes hold, we know good things happen at the admission desk,

in collections storage, and in the boardroom. We know organizations benefit when they

empower individuals to act, entrusting them not only with responsibility but also with

authority. (p. 197)

They also connected self leadership to the larger function of museums as learning organizations,

highlighting the alignment between personal mastery with the larger context of museum work:

"As long as leaders and followers are engaged in an ongoing process of self-understanding, then

it is natural for museums to engage in the same process of experimentation, reflection, and

recalibration" (Ackerson & Baldwin, 2014, p. 47). Though the participant group was small,

nearly all of them voiced their personal value of learning, and the joy it brings them. Given an

employee population that is keen to learn, and given that museums are organizations predicated

on creating learning opportunities, it follows that creating learning opportunities for all staff

about personal mastery and leadership will only serve to strengthen museums at all levels.

     Conclusion 2: Canadian museums should operate in service to community.

     Participants held a clear vision of the importance of strong community relationships, and

the conviction that museums' primary role is about contributing to the public good in two ways.

First, by working to make complex social, economic, and environmental issues accessible

through programming such as exhibitions, community partnerships, and platforms for debate and

dialogue (I-1, I-2, I-3, I-4, I-5, I-6, FG-2, FG-4). Second, by modelling values in the way the

museum operates (I-3, I-4, I-5, I-6).

     The participants' vision of strong community relationships and meaningful social impact

for museums aligned directly with contemporary museum literature, as seen in Chapter 2 of this

thesis (Ackerson & Baldwin, 2014; American Alliance of Museums Center for the Future of

Museums, 2008; Anderson, 2012; Beasley, 2012; Carbone, 2003; Janes, 2009, 2013, 2016; Janes

& Conaty, 2005; Matelic, 2007, 2011; Simon, 2010; Weil, 1999, 2000). For example, Anderson

(2012) emphasized her conviction that "museums as cultural institutions have the power to make

a difference" (p. 9), and she articulated her vision for museums in the 21st century as follows:

"museums are central to the vitality and health of towns, cities, and regions, and can serve as

gathering places for building community and dialogue around contemporary issues" (p. 9). Many

participants spoke to the role museums could play in modelling values for society, which speaks

to working towards a clear vision informed by organizational and individual values—in other

words, from an authentic sense of purpose. Participants' vision for the future of museums of

strong community relationships for meaningful social impact aligned strongly with the vision put

forward by the literature.

Conclusion 3: Canadian museum leaders require specific leadership competencies.

Participants held a clear view that museum leaders need to be values-driven, possessed of a

deep curiosity and broad interest in the complex issues of contemporary life (I-2, I-4, I-6), open

to risk and willing to try new things (I-1, I-3, I-4, FG-5, FG-11, FG-12)—all informed by a deep

expertise in museum practice (I-1, I-2, I-4, I-6, FG-11). This means that museum leadership

requires specific skill sets, competencies, and values.

The work of the Alberta Museums Association's Leadership Working Group established a

core set of competencies for specific museum roles (Alberta Museums Association, 2007,

September). The conviction that museum leadership requires specific competencies is underlined

in the writing of Anderson (2012), Janes (2009, 2013, 2016), Ackerson and Baldwin (2014), and

Falk and Sheppard (2006). Ackerson and Baldwin (2014) echoed the need for a balance of

museum expertise with leadership qualities, as identified by participants: "without forward-leaning, mission-driven, and intentionally entrepreneurial leadership, no amount of collections care, building preservation, or programming will be enough to secure a museum's future" (p. 201). Further, the work of Senge (2006), Wheatley (2006, 2007) and on systems thinking and transformational leadership supports the need for museum leaders to have a deep understanding of the contexts in which they work, and to be continually learning about the complex issues affecting the world today.

Conclusion 4: There are concrete actions the CMA could take to develop leadership for Canadian museums.

Participants offered several practical suggestions that could be undertaken to develop leadership for Canadian museums (I-1, I-2, I-3, I-4, I-5, I-6, FG-2, FG-3, FG-7, FG-8, FG-9, FG-12). Several of these suggestions were actions they believed could benefit the whole sector if championed by the CMA, and/or undertaken by their own museums.

First, they encouraged museums to foster openness (I-1, I-2, I-3, FG-7, FG-8) and nurture development internally, through candid conversation, sharing learning from mistakes (which would make it more acceptable to make them in the first place, which in turns sparks the learning process), and reducing emphasis on hierarchy (I-2, FG-12) by opening up the senior executive thinking and practice to more participation from more levels of staff (I-4, FG-3, FG-9). Second, in line with openness to learning from mistakes and to executive planning, participants urged museums to create new learning opportunities, such as professional internships or mentorships across the sector (I-2, FG-2, FG-9), increased travel bursaries (I-3), and funding for projects which foster organizational learning which might fail—but might also help organizations move forward (I-3, I-5, I-6). Third, participants made specific recommendations about the annual CMA

conference to engage other sectors (I-1, I-3, I-5), and adopt a more research-informed approach to encourage more reflexive and critical discourse (I-3, I-6). The conclusions put forward by this study in turn informed the creation of four recommendations that are outlined in detail in Chapter 5.

Scope and Limitations of the Inquiry

In terms of scope, this was a qualitative study designed to initiate a conversation about leadership development for working professionals in the Canadian museum sector through interviews with six museum workers from across Canada, and through a focus group of CMA staff members. Given there are 32,000 workers in Canada's museums (Department of Canadian Heritage, 2014, p. 4), this study did not intend to yield a comprehensive review of leadership across Canada's museum sector. Rather, the data offer a snapshot of experience to provide a starting point for discussion.

To some extent, a reliance on technology limited the participation options for this study. Recognizing that participants were located across the country, as explained in Chapter 3, I conducted interviews via online videoconferencing. However, two interview participants experienced technical difficulties, so we conducted the interviews by telephone. In-person interviews are viewed as best, followed by those conducted by online videoconferencing. Telephone is not ideal because the interpersonal cues that constitute such a large part of human interaction are inaccessible (Nehls, Smith, & Schneider, 2015, p. 141). This may result in reduced trust or missed interpersonal cues between the researcher and the interviewer.

Given that the participation criteria required participants to have been in the Canadian museum field for at least ten years, the interviews and focus groups did not capture any relatively new perspectives, for example from new graduates, or from those who have newly transitioned

to museums from other sectors. Further, it did not capture any perspectives from those involved in governance, as volunteers, or members of the visiting public as this was beyond the scope of this study. However, future inquiry—as will be discussed in Chapter 5—may include these stakeholder voices.

Chapter Summary

This chapter presented the study findings and put forward conclusions connecting those findings to the literature reviewed in Chapter 2. Through interviews and a focus group this study identified three major findings linked together, as follows:

1. Participants valued learning and sharing learning.

2. Participants shared a vision of strong community relationships and meaningful social impact for museums.

3. Participants believed museum leaders require specific values and abilities to achieve this vision, including: a deep curiosity and broad interest in the issues of contemporary life, an openness to risk and trying new things, and a specific understanding of and expertise about museum work.

4. Participants offered practical ideas to develop leadership for Canadian museums.

These findings informed the study conclusions, which were as follows:

1. Nurturing self-leadership will strengthen Canadian museums.

2. Canadian museums should operate in service to community.

3. Canadian museum leaders require specific expertise and values.

4. There are concrete actions the CMA could take to develop leadership for Canadian museums.

This chapter also put forward a summary of the scope and limitations of the study. The following chapter outlines the recommendations of the study, the implications for the CMA, and puts forward some ideas regarding future research possibilities.

Chapter 5: Inquiry Recommendations and Implications

This chapter begins with four recommendations based on the findings and conclusions outlined in Chapter 4. The chapter then provides a brief overview of the organizational implications of these recommendations for the CMA and recommendations for future research. This chapter closes with a summary of the inquiry project and a vision for the future of Canadian museums.

Recommendations

This section offers several recommendations for the CMA, based on the findings and conclusions of this study as detailed above in Chapter 4. To reiterate, the main question I sought to investigate was "How might the CMA facilitate leadership development among its members?" The sub-questions were as follows:

1. What stories of leadership success do members of the CMA tell?

2. What vision do CMA members have for Canadian museums 10 years from now?

3. What kind of leadership do Canadian museums need to realize that vision?

4. How might the CMA develop this leadership in Canada?

The investigation of these questions generated four conclusions, which were as follows:

1. Nurturing self-leadership will strengthen Canadian museums.

2. Canadian museums should operate in service to community.

3. Canadian museum leaders require specific expertise and values.

4. There are concrete actions the CMA could take to develop leadership for Canadian museums.

Accordingly, this study makes four recommendation for the CMA in order of priority and timing —as put forward by both the inquiry participants and reviewed with CMA board members at the session held after the focus group.

Recommendation 1: Champion leadership learning.

The most important action CMA can undertake is to champion leadership and learning about leadership, as this study indicated that valuing leadership and fostering its development will directly strengthen the sector. In its *2015–2018 Strategic Plan*, the CMA identified leadership as one of its core values (Canadian Museums Association, 2015, p. 9).

There are several initiatives that the CMA could undertake to do this efficiently, and I suggest two for discussion with CMA. First, the development of a leadership working group, constituted by volunteers among the CMA membership, tasked with identifying the necessary research, and developing a set of prioritized actions and deliverables (including those suggested later this in chapter). This would help the CMA develop leadership resources and provide leadership for a national conversation about leadership in Canadian museums. This group could also review the suggested actions that Ackerson and Baldwin (2014, p. 203; see above for the complete list) developed to help professional museums associations foster leadership development and select any actions from that list the CMA could prioritize.

Second, the CMA could support the work of the leadership working group through a coordinated communications strategy to highlight the value of leadership and why leadership is important with members. The communications strategy could include some relatively simple actions: regrouping relevant leadership material and existing professional development supports (such as bursaries) in a dedicated section of the CMA website, creating an issue of MUSE (the CMA's quarterly magazine) dedicated to leadership, and/or adding leadership to the program at

the annual conference. Given that many museum workers are so stretched for time, a resource that provided quick and easy resources, and "digest" versions of key leadership literature would be a valuable resource.

Ackerson and Baldwin (2014) aligned their research into history museum leadership with the work of Senge (2006), to drive home the point that they believe that a sector wide prioritization of learning about leadership is critical:

> The museum field, but particularly history museums, historic homes, and heritage organizations, needs to put leadership at the top of the to-do list . . . because we believe that intentional, forward-leaning leadership is the key to moving history and cultural heritage museums beyond the doldrums in which so many find themselves. (Ackerson & Baldwin, 2014, p. 195)

Championing leadership learning is an efficient way to help prioritize the issue across the sector.

Recommendation 2: Move forward with the implementation of goal one in the *CMA Strategic Plan 2015–2018*.

The *CMA Strategic Plan 2015–2018* identified leadership as one of its new core values (Canadian Museums Association, p. 9), and defined the work for the organization in four long-term goals. Leadership development fits best with the first goal, which is: "museum professionals have the required information, tools and resources, and effective networks to connect with each other and the sector" (Canadian Museums Association, 2015, p. 11). The plan then outlined three desired outcomes, supported by the articulation of short, mid and long-term objectives clearly tied to specific measures. The long-term objective is the implementation of a museum training and professional development strategy. A leadership lens could be applied to this work, in line with the CMA's values. The CMA's 2015 annual report announces the creation

of the strategic plan (p. 21), but includes no further information on the progress of its

implementation. At time of writing (November 2016), CMA's Director of Programs and Public

Affairs provided the following update on goal one:

> In regards to . . . the museum training and professional development needs assessment, the
>
> CMA has completed formal evaluations and analyzed educational sessions and the overall
>
> programs for the CMA [conference] 2015, Museum Enterprises Conference 2016 and
>
> CMA [conference] 2016. Questions about members' training needs will be added to the
>
> next CMA member survey/focus groups (date TBD). It is also a topic frequently discussed
>
> at the provincial museum association meetings organized by the CMA, and the
>
> development of a comprehensive strategy is to be included in the agenda for the spring
>
> 2017 board meeting. Finally, a list of museum studies programs is available on the CMA
>
> website as a member resource, and regularly updated. (A. Vermette, personal
>
> communication, November 24, 2016)

The 2016 annual report, to be released in the spring of 2017 will be the CMA's first opportunity

to report to the membership on progress to date. A comprehensive study of training is an

important piece of the leadership puzzle, but as these recommendations drawn from the research

show, there are additional actions the CMA could take.

Recommendation 3: Develop tools to support museums in building community.

The second conclusion of this study, that museums should operate in service to

community, surfaced consistently and clearly throughout this inquiry. Both the participants and

the literature agreed that for museums to be successful, both in terms of securing ongoing funds

and growing audiences, demonstrating relevance to the social, environmental, and economic

challenges of our time is critical. As one participant expressed it in the findings section above,

museums need to be confident that they have something relevant and essential for society, I repeat it here for its stark clarity: "if you're unsure then don't expect society to be there for you—if you're not convinced yourself it's going to be very hard to convince other people" (I-2).

Many museums struggle with putting this philosophy into action and, as many writers noted, there is much talk of building relevance and working in service to community, but not many museums are putting this into practice in substantive ways (Ackerson & Baldwin, 2014; Anderson 2012; McCall & Gray, 2014; Janes 2009, 2013, 2016; Janes & Conaty, 2015).

Among the specific competencies and expertise that participants identified as important for museum leaders, was an understanding of the complex issues facing the world (I-1, I-2, I-3, I-4, I-5, I-6, FG-4, FG-17). One participant suggested to help museums address the complex social, economic, and environmental issues we grapple with today, that is, to "take dense problems and make them accessible, digestible for the public, the CMA could work to help museums understand those issues" (I-2). Through partnership with agencies that already generate this kind of research, such as the Community Foundations of Canada or the Canadian Centre for Policy Alternatives (there are many others), CMA could provide members with basic resources and data on the key trends facing Canada and Canadians. Related to this participants also specifically identified the need to know how to build cross-sector partnerships (I-1, I-2, I-3, I-4, I-5, I-6, FG-2, FG-11, FG-17). Resources to help museums identify and digest contemporary issues with support for developing expertise and related programming, as well as changes to operations (for example to reduce energy consumption), as well as resources to help organizations learn how to develop cross-sector partnerships could be a cost effective way to build capacity on this front.

Recommendation 4: Consider the specific suggestions put forward by inquiry participants and board members.

The participants in this inquiry, and the CMA board members who participated in the session to review the preliminary findings from the interviews and the focus group, offered a number of specific suggestions and ideas to the CMA to support the development of leadership among the membership. It is important to recognize that, given the resources available to CMA, not all the suggestions brought forward in this study are possible. Some are, however, and it is worth reviewing them to identify those that both align well with the goal of developing leadership capacity among the membership, and are cost effective.

Participants put forward the three following specific suggestions.

Foster shared learning.

Consider creating a resource like Communitech.ca to foster shared learning among the leadership of Canadian museums (I-1), to stimulate more activity among the CMA's directors forum outside the annual conference (I-1, I-2, I-6), and to create more formal mentorship opportunities for leaders across the sector. Several focus group participants described the value of mentorship opportunities, such as the opportunity to sit in on senior leadership meetings to learn about the larger picture, and feel more connected to overall strategic priorities (I-1, I-2, FG-11). The value of mentorship was echoed by the CMA board members during the review session. As CMA board member Nancy Noble stated, "Mentorship is really important. When I started, I reached out to several people, and they weren't interested in mentoring—I was in the deep end and had to learn to swim on my own" (personal communication, October 4, 2016). A formal mentorship program to foster shared learning for museum leaders would be valued.

Survey current post-secondary offerings.

During the session with the CMA board members to review this study's preliminary

findings, board members discussed the possibility of the CMA undertaking a survey of post-

secondary training programs to identify opportunities for the CMA to generate professional

leadership development opportunities, tailored to the specifics of museum operations, through

partnership with various university and college programs across the country. The exact scope of

possible training programs would need to be determined, it could include those related to

museum studies, but also leadership programs more generally (for example the leadership

programs offered by the Banff Centre and Royal Roads University, among others). This could be

an undertaking assigned to the leadership working group. There might also be some value in

collaborating with the Alberta Museums Association to resurrect the Canadian version of

NextGen, possibly in partnership with the Banff Centre.

Develop a professional internship program.

Support the creation and implementation of a mentorship or internship program for

museum workers who are interested in learning new perspectives and new skills through

working in another museum, possibly in another part of the country. As one participant

suggested in the findings section, I repeat it here for emphasis:

It would be interesting to think of professional or leadership development in a sequential

way: community, municipal, provincial, national. If we're all publicly funded, then why

not build an ecology of professional development? Could we envisage a system where the

bigger help the smaller? We have an internship program for students, but nothing for

professionals. Why doesn't my organization have a professional development opportunity

for professionals to come and spend 5-6 months in our institution to learn? Then we could

send our staff to smaller organizations where they would gain invaluable learning, new

relationships, and different perspectives. (I-2)

The creation of a professional internship program aligns with the suggestions around mentorship

listed above. There is clearly a need to build relationships and foster stronger networking across

the sector. Programs would ideally serve a broad range of museum workers, all levels of staff

(from students and emerging professionals, to those in mid-career and seasoned leaders). It will

also be important to consider access for those museum workers in rural and remote locations, and

what can be done to ensure opportunities for their development are included.

Organizational Implications

This section describes the organizational implications of this study for the CMA. As the

main inquiry question was, "How might the CMA facilitate leadership development among its

members?", the findings, conclusions, and recommendations offered concrete ways for the CMA

to facilitate leadership development among museums and museum workers across the country.

Addressing this question leads to several implications for the CMA.

As described in the study conduct section in Chapter 3, I engaged with the CMA

throughout this study, initially gaining the support of the Executive Director, then keeping the

organization abreast of the process and inviting the CMA's participation in the development of

questions, the generation of the interviewee list, as well as the inclusion of CMA staff in the

focus group.

Following the focus group, I shared an overview of the literature review and the

preliminary findings with CMA board members. At this meeting, the ways in which we might

continue this work were discussed in some detail. The CMA board only meets in person twice a

year (at the annual spring conference and in the fall), so opportunities for group discussion are

infrequent. During the session, I reviewed the next steps of the research project, which included

drafting a set of recommendations based on the participant data (as put forward in Chapter 5)—

informed by both the literature and the board discussion. The CMA board invited me to the

following spring meeting to share these recommendations and to discuss a plan for moving them

forward. As the Director of Programs and Public Affairs noted:

> We were so glad you could join us and present your findings to both the CMA team and
>
> the Board of Directors. Everyone was quite enthusiastic as to the results compiled so far,
>
> and saw the benefit of your study. Their interest and level of participation, from ideas and
>
> comments shared, demonstrate the importance of leadership development in the museum
>
> sector. Thank you for your work on this study. We are looking forward to developing and
>
> implementing the next steps. It will be great to organize a second presentation with the
>
> team once your work is done. (A. Vermette, personal communication, October 7, 2016)

It was suggested that the study might yield some useful material for the quarterly MUSE

magazine, and I have also been invited to submit this research paper to the 2018 annual

conference proceedings once it is complete in spring 2017.

How the CMA board and staff decide to move forward with any of the recommendations

will govern the next steps are. However, the second recommendation is intended to amplify the

work already underway, so my understanding is that the major implication for the CMA is to

share the good work they have already put into place in the context of the *CMA Strategic Plan*

2015–2018. The broader implication for museums, if leadership development is not embraced, is

an exacerbation of the identified succession gap (Ackerson & Baldwin, 2006; Alberta Museums

Association, 2007) and the trend of hiring senior leadership positions from outside the country

(Sandals, 2016). There are of course other issues at play here, such as low morale and

dissatisfied workers related to non-responsive institutions, rigid hierarchies, and lack of opportunities, but addressing leadership will begin to address these and the problem of succession. Moving forward with efforts to develop leadership among the CMA membership would be an active means for CMA to deliver on its mission to "advance Canadian museums to ensure meaningful connections with their communities by providing leadership, fostering a national museum community, and increasing the value of museums to society" (Canadian Museums Association, 2015, p. 8). In turn, actively embracing leadership development could help the CMA achieve its vision: "Museums are valued public institutions that inspire understanding and encourage solutions for a better world" (Canadian Museums Association, 2015, p. 8). For museums to be valued public institutions, they must be connected to their communities. Some museums have embraced community engagement, although not nearly enough (Janes, 2009; Ackerson & Baldwin, 2014; Johnson, 2012; Matelic, 2007), and the implication for those that do not is a slow erosion of relevance and, in turn, public support, funding, and audiences.

The recommendations put forward above were conceived to align with and build on the current work of the CMA, recognizing that new programs typically require new funding which can be difficult to obtain. However, if the CMA is able to engage members in this work as volunteers (for example through a leadership working group), organizes and makes accessible leadership materials that already exist, and works in partnership with other agencies, it should be able to have a significant impact on the sector in an efficient and cost effective manner. In short, a strong first step is a coordinated effort to tell a new story about professional development work that the CMA has begun, followed by a plan to expand the focus on leadership and champion it through communications strategies.

The principles of action research (AR) rest on the formulation of a problem by a group of people who are affected by it, followed by a collective investigation with a view to learning from the investigation, and—informed by that learning—a second reformulation of the problem to inform further research and learning (Coghlan & Brannick, 2014; Reason & Bradbury, 2001; Stringer, 2014). The AR research model would serve as an excellent model for the continued work of developing leadership among the members of the CMA. This is true not only for the data it will yield, but also because it will allow CMA to model what organizational learning looks like for its members across the country and, in turn, share that meta-learning with the membership.

First person research is a reflexive practice of self-investigation (for example, meditation and continuous learning) with the intent of guiding future action with purpose (Coghlan & Brannick, 2014, p.7). Second person research is about working with others on questions of shared interest (Coghlan & Brannick, 2014, p.7). Torbert and Taylor's (2008) third-person research is about creating the conditions in which people can engage in first and second-person research. Third person research integrates both perspectives through the creation of a community of inquiry—to generate information that can then be shared more widely, beyond the immediate community of inquiry (Torbert & Taylor, 2008). I have conducted first and second person research by asking participants to reflect (first person) on a series of questions, and to share their reflections in dialogue with me (as the researcher) through interviews, and with each other through a focus group. Through this process, the first and second-person research have generated third-person research which "is actualized through dissemination by reporting" (Coghlan & Brannick, 2014, p. 7). In other words, others beyond the immediate community of inquiry can read this thesis document.

Through the study findings and conclusions, participants have connected the importance of fostering self-leadership, or first person research in Torbert and Taylor's (2008) terms, with the ability of museums to engage meaningfully and successfully with their communities over the long term. Museum literature clearly articulates the pressing need for community engagement (Ackerson & Baldwin, 2014; American Alliance of Museums Center for the Future of Museums, 2008; Anderson, 2012; Beasley, 2012; Janes, 2009, 2013, 2016; Janes & Conaty, 2005; Matelic, 2007; Simon, 2010; Weil, 1999, 2000), and participants in this inquiry demonstrated that fostering personal mastery (Senge, 2006) is a cornerstone on which museums can build strong community relationships. "Museums are valued public institutions that inspire understanding and encourage solutions for a better world" (Canadian Museums Association, 2015, p. 8). Inspiring solutions for a better world demands an understanding of, and relationship with, the world, and it is through deep relationships to community, strong relationships among the staff members, and museum workers' relationships to themselves that museums can establish their public value. The recommendations in this thesis will help the CMA achieve its vision for museums.

Implications for Future Inquiry

This section examines the implications of the scope and process of this inquiry project and offers suggestions for future research that emerged during the project.

First, given the interview selection criteria, museum workers who are new to the field were excluded, so one of the focus group participants suggested that it might be interesting to conduct the same inquiry project with new professionals (both those newly graduated and those who have newly come to museum work from other sectors) to see how the results might compare (FG-4). Further, at six interview participants, the scope of this study was small. It would be useful to

structure a subsequent inquiry into Canadian museum leadership to generate a larger pool of data.

In addition, given that strong community relationships for meaningful social impact emerged as a major theme of the both the literature reviewed in Chapter 2 and the findings explored in Chapter 4, it might prove interesting and relevant to conduct interviews with a cross-section of representatives from community service agencies and others outside the museum sector.

Second, during the follow-up session with the CMA board, one board member suggested an addition to the proposed survey of post-secondary programs: it might be useful to generate an understanding of how much, if any, curriculum content in museum studies programs is devoted specifically to leadership.

Third, given the identified gap between the museum literature which presses the sector to develop strong community relationships, and the apparently limited practical application of this advice, it would seem there is a disconnect between the academic museum community and the practitioner community. It could be useful to spend some time examining this gap, and what might be done, in addition to the recommendations of this study, to bridge it. This study demonstrated that continuous learning, and self-leadership can help museums build stronger and more meaningful relationships with community, and this means that museum practitioners and the academic community dedicated to learning about museum practice must come closer together to share and learn together.

Finally, in keeping with the principles of AR (Coghlan & Brannick, 2014; Stringer, 2014; Torbert & Taylor, 2008), it is only through ongoing inquiry and continued, reflexive practice that museum workers will be able to continue to learn, adapt, and grow in their relationships to the

communities they serve. As museums are, by definition and practice, learning organizations, it is time the sector improved its ability to enact the principles of learning organizations internally, within their operations, as the means for improving their capacity to provide learning opportunities for public engagement. Perhaps it is a simple as museums learning to "model the way" (Kouzes & Posner, 2007) of continuous learning and self-leadership.

Thesis Summary

In partnership with the CMA, the question I have worked to address was, "How might the CMA facilitate leadership development among its members?"

To provide context for the findings of these research questions, I undertook a literature review that covered the following three topics. The first topic explored self-leadership, defined what it is, described its connection to organizational leadership, and explained the relevance of developing leadership at all levels within an organization.

The second topic, museums and community, reviewed current literature regarding the changing role of museums in society, and offered several models for museums to establish community relevance, from community building, to participation and co-creation, and activism. This topic summarized the significance of social relevance to the future of museums.

The third topic, museum leadership development, offered a brief review of some possible organizational models for museums and the relevance of developing leadership at all levels in museums, briefly reviewed current writing about the development of museum leadership competencies, and noted recent efforts by the Alberta Museums Association and others to offer professional leadership development opportunities in Canada.

The literature review complemented the main inquiry effort to address the stated research questions through a series of interviews and a focus group with Canadian museum workers, and led to the following four findings:

1. Participants valued learning and sharing learning.

2. Participants shared a vision of strong community relationships for meaningful social impact for museums.

3. Participants believed museum leaders require specific values and abilities to achieve this vision, including a deep curiosity and broad interest in the issues of contemporary life, an openness to risk and trying new things, and a specific understanding of and expertise about museum work.

4. Participants offered practical ideas to develop leadership for Canadian museums.

These findings informed the study conclusions, as follows:

1. Nurturing self-leadership will strengthen Canadian museums.

2. Canadian museums should operate in service to community.

3. Canadian museum leaders require specific expertise and values.

4. There are concrete actions the CMA could take to develop leadership for Canadian museums.

The literature review, the data summarized in the findings, and the conclusions I have put forward gave rise to the following recommendations through dialogue with participants and CMA board members. As reviewed earlier in this chapter, this inquiry project generated the following four recommendations:

1. The CMA should champion leadership learning, by valuing leadership (as it has done it its most recent strategic plan), by considering the creation of a volunteer leadership working group, and by sharing that value widely through a communications strategy.

2. The CMA should move forward with the implementation of goal one in the *CMA Strategic Plan 2015–2018*, which is focused on ensuring museum workers have the information, tools, resources and networks to build relationships across the sector.

3. The CMA should develop tools to support museums in building stronger community relationships. Museums could benefit from summary information on the complex social, economic, and environmental issues of our time, as well as models for building cross-sector partnerships.

4. The CMA should review and consider the specific suggestions put forward by inquiry participants, which ranged from fostering shared learning via online and/or directors' forums, to mentorship programs, to undertaking a survey of current post-secondary offerings related to leadership, management as well as museums studies, with a view to identifying opportunities to partner on professional training for museum leadership development, to developing a professional internship program.

Following these recommendations for further discussion with the CMA, this chapter reviewed the implications of developing leadership capacity among the membership, including a summary of the next steps discussed to date. This chapter closed with a consideration of future inquiry topics that might also provide the CMA with relevant and interesting data.

In summary, this thesis links the practice of personal mastery or self-leadership with the capacity of museums to develop strong relationships with their communities and generate significant, meaningful social impact. I believe that museums are vibrant and compelling

organizations that draw from our collective past, to inquire into our present, in order to shape our

emergent future.

References

Abe, T., & Chowdhery, S. (2012). *World-class leadership: Leading yourself, your team, the world and society.* Singapore: World Scientific Publishing. Retrieved from http://library.books24x7.com.ezproxy.royalroads.ca/toc.aspx?bookid=49916

Ackerson, A., & Baldwin, J. (2006). Who's next? Research predicts museum leadership gap. *Museum Management and Curatorship, 21*(4), 349–352. doi:10.1080.09647770600902104

Ackerson, A., & Baldwin, J. (2014). *Leadership matters.* Lanham, MD: AltaMira.

Alberta Museums Association. (2007, June). *Leadership working group final report.* Retrieved from http://www.museums.ab.ca/media/16943/leadership_working_group_ final_report_with_appendices.pdf

Alberta Museums Association. (2007, September). *Competencies for museum leadership.* Retrieved from http://www.museums.ab.ca/media/20383/competencies_ for_museum_leadership__full_.pdf

American Alliance of Museums. (n.d.). *Center for the future of museums.* Retrieved from http://www.aam-us.org/resources/center-for-the-future-of-museums

American Alliance of Museums Center for the Future of Museums. (2008). *Museums and society 2034: Trends and potential futures*. Retrieved from http://www.aam-us.org/docs/center-for-the-future-of-museums/museumssociety2034.pdf?sfvrsn=0

Anderson, G. (Ed.). (2012). *Reinventing the museum: The evolving conversation on the paradigm shift.* (2nd ed.). Lanham, MD: AltaMira.

Armenakis, A. A., & Harris, S. G. (2009). Reflections: Our journey in organizational change research and practice. *Journal of Change Management*, *9*(2), 127.

Armstrong, K. (2010). *Twelve steps to a compassionate life*. New York, NY: Knopf.

Banff Centre, the. (2015). *New fundamentals. Leadership for the creative and cultural sector.* (Program guide.) Retrieved from: http://www.banffcentre.ca/media-release/1206/announcing-a-new-fundamentals-program-cultural-leaders

Banff Centre, the. (2016). *Programs.* Retrieved from https://www.banffcentre.ca/programs/all/leadership

Banff Centre, the. (2016). *About Us*. Retrieved from https://www.banffcentre.ca/about-banff-centre-arts-and-creativity

Beard, A. (2012). *No money, no mission. Financial performance, leadership structure, and budgeting in non-profit performing arts organizations.* (Doctoral dissertation). Retrieved from http://search.proquest.com.ezproxy.royalroads.ca/docview/931130142/fulltextPDF?accountid=8056

Beasley, L. (2012, October). *The city as museum and the museum as city*. Paper presented at the International Council of Museums' international committee for the Collections and Activities of Museums of Cities (CAMOC) conference at the Museum of Vancouver, Vancouver BC. Retrieved from http://www.museumofvancouver.ca/programs/blog/2012/11/2/city-museum-and-museum-city

Bushe, G. R. (2005). Appreciative leadership. *Journal of the American Dietetic Association,* 105(5), 699–700. doi: 10.1016/j.jada.2005.03.016. Retrieved from http://www.sciencedirect.com.ezproxy.royalroads.ca/science/article/pii/S0002822305003305

Bushe, G. R. (2012). Foundations of appreciative inquiry: History, criticism, and Potential. *AI Practitioner, 14*(1), 8–20. Retrieved from https://ezproxy.royalroads.ca/login?url=http://search.ebscohost.com.ezproxy.royalroads.ca/login.aspx?direct=true&db=bth&AN=83431258

Carbone, S. (2003, winter). The dialogic museum. *Muse, 31*(1), 36–39.

Canadian Institutes of Health Research, Natural Sciences and Engineering Research Council of

    Canada, and Social Sciences and Humanities Research Council of Canada, *Tri-Council*

    policy statement: Ethical conduct for research involving humans, December 2014.

    Retrieved from http://www.pre.ethics.gc.ca/pdf/eng/tcps2-2014/TCPS_2_FINAL_Web.pdf

Canadian Museums Association. (1999). *Ethics guidelines*. Retrieved from

    http://www.museums.ca/uploaded/web/docs/ethicsguidelines.pdf

Canadian Museums Association. (2014). *About the CMA*. Retrieved from

    http://museums.ca/site/about

Canadian Museums Association. (2015). *CMA strategic plan 2015–2018.* Retrieved from

    http://www.museums.ca/uploaded/web/docs/CMA_Strategic_Plan_2015_2018.pdf

Chenail, R. J. (2011). Interviewing the investigator: Strategies for addressing instrumentation

    and researcher bias concerns in qualitative research. *The Qualitative Report*, *16*(1), 255–

    262. Retrieved from http://nsuworks.nova.edu/tqr/vol16/iss1/16

Claremont Graduate University. (2016). *About GLI*. Retrieved from

    http://www.cgu.edu/pages/11124.asp

Coghlan, D., & Brannick, T. (2014). *Doing action research in your own organization*. (4th ed.).

    Thousand Oaks, CA: Sage.

Conner, D. (2013). *Roles in change*. [Video file] Retrieved from

    https://www.youtube.com/watch?v=-wFsGNH2Otw

Cooperrider, D. L., & Whitney, D. (2005). *Appreciative inquiry: A positive revolution in change.* San Francisco, CA: Berrett-Koehler. Retrieved from https://ezproxy.royalroads.ca/ login?url=http://search.ebscohost.com.ezproxy.royalroads.ca/login.aspx?direct=true&db=n lebk&AN=260683.

Cooperrider, D. L., Whitney, D. K., & Stavros, J. M. (2008). *Appreciative inquiry handbook: For leaders of change*. Brunswick, OH: Berrett-Koehler.

Creswell, J. W., & Miller, D. L. (2000). Determining validity in qualitative inquiry. *Theory into practice (39)*3, 124–130. doi: 10.1207/s15430421tip3903_2

Dana, J. C. (1917). The gloom of the museum. In Anderson, G. (Ed.). *Reinventing the museum: The evolving conversation on the paradigm shift.* (2nd ed.), 17–33. Lanham, MD: AltaMira.

Davis, J. A. (2011). *Putting learning to work: Knowledge transitions from continuing professional education to museum workplaces* (Doctoral dissertation). Retrieved from https://dspace.library.uvic.ca//handle/1828/3565

Department of Canadian Heritage. (2014). *Government of Canada survey of heritage institutions 2011.* (Catalogue No. CH1-32/2011E-PDF). Retrieved from http://www.pch.gc.ca /eng/1413470724735

Department of Finance Canada. (2016). *Budget 2016: Growing the middle class.* Retrieved from http://www.budget.gc.ca/2016/docs/plan/budget2016-en.pdf

Ernst, D., Esche, C., & Erbslöh, U. (2016). The art museum as lab to re-calibrate values towards sustainable development. *Journal of Cleaner Production*, *135,* 1446–1460. Retrieved from http://www.sciencedirect.com.ezproxy.royalroads.ca/science/article/pii/S09596526163088 36

Falk, J. H., & Sheppard, B. K. (2006). *Thriving in the knowledge age: New business models for museums and other cultural institutions.* Lanham, MD: AltaMira.

Freire, P. (2005). *Pedagogy of the oppressed: 30th anniversary edition.* New York, NY: Continuum. Retrieved from http://hemisphericinstitute.org/hemi/es/component/docman/ doc_download/689-pedagogy-of-theoppressed

Gillham, B. (2000). *The research interview*. New York, NY: Continuum.

Glesne, C. (2016). *Becoming qualitative researchers: An introduction* (5th ed.). Boston, MA: Pearson.

Golafshani, N. (2003). Understanding reliability and validity in qualitative research. *The Qualitative Report, (8)*4, 597–607. Retrieved from http://www.nova.edu/ssss/QR/QR8-4/golafshani.pdf

Hammersley, M. (2005). *Taking sides in social research: Essays on partisanship and bias.* Florence, US: Routledge. Retrieved from ProQuest ebrary.

Jackson, B., & Parry, K. (2011). *A very short, fairly interesting and reasonably cheap book about studying leadership* (2nd ed.). London, UK: Sage.

Janes, R. (2009). *Museums in a troubled world. Renewal, irrelevance, or collapse?* Oxon, UK: Routledge.

Janes, R. (2013). *Museums and the paradox of change* (3rd ed.). Oxon, UK: Routledge.

Janes, R. (2016). *Museums without borders: Selected writings of Robert R. Janes.* Oxon, UK: Routledge.

Janes, R. & Conaty, G. (2005). *Looking reality in the eye: Museums and social responsibility.* Calgary, AB: University of Calgary Press.

Johnson, J. I. (2012). *Museums, leadership, and transfer an inquiry into organizational supports for learning leadership* (Doctoral dissertation). Retrieved from ProQuest Dissertations & Theses Global. (Order No. 3531116).

Johnson, J. I., & Roberts, R. C. (2009, Nov/Dec). The practice of leadership in a changing environment. *ASTC Dimensions*. Retrieved from http://www.astc.org/astc-dimensions/the-practice-of-leadership-in-a-changing-environment/

Krueger, R. A., & Casey, M. A. (2015). *Focus groups: A practical guide for applied research.* (5th ed.). Thousand Oaks, CA: Sage.

Knelman, M. (2015, November 8). Incoming CEO vows to make Royal Ontario Museum among world's top ten. *Toronto Star*. Retrieved from http://www.thestar.com/entertainment/2015/11/07/incoming-ceo-vows-to-make-royal-ontario-museum-among-worlds-top-10.html

Kouzes, J., & Posner, B. (2007). *The leadership challenge*. (4th ed.). San Franciso, CA: Jossey-Bass.

Kotler, N. (2005). Commentary. *Museum Management and Curatorship, (20)*1, 81–81, doi: 10.1080/09647770500802001. Retrieved from http://dx.doi.org/10.1080/09647770500802001

Langlois, M.-C. (2013). *Canada's national museums*. Background paper. Library of Parliament. (Publication No. 2013-06-E). Retrieved from http://www.parl.gc.ca/Content/LOP/ResearchPublications/2013-06-e.pdf

Lincoln, Y. S., Lynham, S. A., & Guba, E. G. (2011). Paradigmatic controversies, contradictions, and emerging confluences, revisited. In Denzin, N. K., & Lincoln, Y. S. (Eds.), *The Sage handbook of qualitative research* (4th ed.), 97–128. Los Angeles, CA: Sage.

Litosseliti, L. (2003). *Continuum research methods: Using focus groups in research.* London,

UK: Continuum. Retrieved from ProQuest.

Matelic, C. T. (2007). *Organizational change in history museums.* (Doctoral dissertation).

Retrieved from ProQuest Dissertations and Theses. (UMI No. 3286299).

Matelic, C. T. (2011). New roles for small museums. In Catlin-Legutko, C., & Klingler, S.

(Eds.), *Small museum toolkit, book four: Reaching out and responding to the audience.*

(pp. 141–162). Nashville, TN: American Association for State and Local History /

AltaMira.

Matelic, C. T. (2016). Folklife museums, sustainability, and social entrepreneurship. In

Dewhurst, C. K., Hall, P. & Seeman, C. (Eds.), *Folklife and museums: 21st century

perspectives.* (pp. 349–374). Lanham, MD: Rowman and Littlefield.

McCall, V. & Gray, C. (2014). Museums and the 'new museology': Theory, practice and

organizational change. *Museum Management and Curatorship, (29)*1, 19–35.

doi: 10.1080/09647775.2013.869852

Mehra, B. (2002). Bias in qualitative research: Voices from an online classroom. *The Qualitative

Report, (7)*1. Retrieved from http://www.nova.edu/ssss/QR/QR7-1/mehra.html

Morgan, D., & Guevara, H. (2008). Interview guide. In Given, L. M. (Ed.), *The Sage

encyclopedia of qualitative research methods.* (pp. 470–471). Thousand Oaks, CA: Sage.

doi: http://dx.doi.org.ezproxy.royalroads.ca/10.4135/9781412963909.n238

MuseumNext. (2016, July 4). A short interview with MuseumNext founder Jim Richardson.

Public Art Magazine Korea. Retrieved from https://www.museumnext.com/2016/07/

interview-jim-richardson/

Natural History Museum, the. (n.d.). *About.* Retrieved from

http://thenaturalhistorymuseum.org/about/

Natural History Museum, the. (2015, March 24). *An open letter to museums from members of the scientific community*. Retrieved from http://thenaturalhistorymuseum.org/open-letter-to-museums-from-scientists/

Nehls, K., Smith, B. D. & Schneider, H. A. (2015). Video-conferencing interviews in qualitative research. In Hai-Jew, S. (Ed.), *Enhancing qualitative and mixed methods research with technology,* 140–157. Hershey, PA: IGI Global. doi:10.4018/978-1-4666-6493-7

NextGen. (2011). *Announcing the inaugural class of NextGen: Canada.* (Media release). Retrieved from http://public.museums.ab.ca/userfiles/files/Announcement_ NextGen%20Canada%20Inaugural%20Class.pdf

Palys, T. (2008). Purposive sampling. In Given, L. M. (Ed.), *The SAGE encyclopedia of qualitative research methods.* (pp. 698–699). Thousand Oaks, CA: Sage. doi: http://dx.doi.org.ezproxy.royalroads.ca/10.4135/9781412963909.n349

Patton. M. Q. (2015). *Qualitative research and evaluation methods*. (4th ed.). Thousand Oaks, CA: Sage.

Perry, G. (2013, March 30). Innovator drives museum's success. *Santa Cruz Weekly*. Retrieved from http://museumtwo.blogspot.ca/2013/03/quick-hit-long-story-about-mah.html

Pless, N. (2007). Understanding responsible leadership: Role identity and motivational drivers: The case of Dame Anita Roddick, founder of the Body Shop. *Journal of Business Ethics*, *74*(4), 437–456. doi: 10.1007/s10551-007-9518-x

Reason, P., & Bradbury, H. (2001). *Handbook of action research.* Thousand Oaks, CA: Sage.

Reid, W. (2005, July). *Institutionalized, mandated dual leadership in non-profit arts organizations: One conceptualization of the phenomenon and its implications for organizational effectiveness.* Paper presented at the International Association of Arts and Cultural Management Conference. Montreal, QC. Retrieved from: http://neumann.hec.ca/aimac2005/PDF_Text/Reid_Wendy.pdf

Ritchie, J. & Lewis, J. (2003). *Qualitative research practice: A guide for social science students and researchers.* London, UK: Sage. Retrieved from https://mthoyibi.files.wordpress.com/2011/10/qualitative-research-practice_a-guide-for-social-science-students-and-researchers_jane-ritchie-and-jane-lewis-eds_20031.pdf

Robinson, O. C. (2014). Sampling in interview-based qualitative research: A theoretical and practical guide. *Qualitative Research in Psychology, (11)*1, 25–41. doi: 10.1080/14780887.2013.801543

Ross, V. (2006, April 1). Why our museums are dying. *The Globe and Mail.* Retrieved from http://www.theglobeandmail.com/arts/why-our-museums-are-dying/article705865/

Roulston, K. (2008). Open-ended question. In Lisa M. Given (Ed.), *The Sage encyclopedia of qualitative research methods.* (p. 583). Thousand Oaks, CA: Sage. doi: http://dx.doi.org.ezproxy.royalroads.ca/10.4135/9781412963909.n300

Rowe, W., Graf, M., Agger-Gupta, N., Piggot-Irvine, E., & Harris, B. (2013). *Action research engagement: Creating the foundation for organizational change*. ALARA monograph series No. 5.

Sandals, L. (2016, April). Beyond press releases: 5 questions about art institutions. *Canadian Art*. Retrieved from http://canadianart.ca/features/beyond-press-releases-5-questions-art-institutions/

Santa Cruz Museum of Art and History. (n.d.). *About us*. Retrieved from https://santacruzmah.org/about/mission-and-impact/

Saumure, K., & Given, L. (2008). Convenience sample. In Given, L. M. (Ed.), *The Sage encyclopedia of qualitative research methods*. (pp. 125–126). Thousand Oaks, CA: Sage. doi: http://dx.doi.org.ezproxy.royalroads.ca/10.4135/9781412963909.n68

Senge, P. M. (2006). *The fifth discipline: The art and practice of the learning organization.* New York, NY: Currency Doubleday.

Short, R. R. (1998). *Learning in relationship: Foundation for personal and professional success.* Seattle, WA: Learning in Action Technologies.

Simon, N. (2010). *The participatory museum*. Santa Cruz, CA: Museum 2.0.

Sink, C., & Mvududu, N. (2010). Statistical power, sampling, and effect sizes: Three keys to research relevancy. *Counselling Outcome Research and Evaluation, 1*(2), 1–18. doi: 10.1177/2150137810373613

Stewart, G. L., Courtright, S. H., & Manz, C. C. (2011). Self-leadership: A multilevel review. *Journal of Management*, *37*(1), 185-222. Retrieved from http://journals.sagepub.com.ezproxy.royalroads.ca/doi/abs/10.1177/0149206310383911?journalCode=joma&volume=37&year=2011&issue=1

Stringer, E. (2014). *Action research*. (4th ed.). Thousand Oaks, CA: Sage.

Suchy, S. (1999). Emotional intelligence, passion and museum leadership. *Museum Management and Curatorship, 18*(1), 57–71.

Suchy, S. (2000). *Personal change and leadership development: A process of learning how to learn.* Paper presented at the International Council of Museums Committee for the Training of Personnel (ICTOP) 2000 Meeting & Symposium, Victoria, British Columbia.

Suchy, S. (2004). *Leading with passion: Change management in the 21ˢᵗ century museum*. Lanham, MD: AltaMira.

Svyantek, D., & Brown, L. (2000). A complex-systems approach to organizations. *Current Directions in Psychological Science, 9*(2), 69–74. Retrieved from http://www.jstor.org.ezproxy.royalroads.ca/stable/20182626

Thorpe, V. (2016, February 7). From D. H. Lawrence's home to industrial mills, is regional heritage in jeopardy? *The Guardian.* Retrieved from http://www.theguardian.com/culture/2016/feb/07/britain-risks-becoming-cultural-desert-as-museums-vanish?CMP=Share_iOSApp_Other

Torbert, W. R., & Taylor, S. (2008). Action inquiry: Interweaving multiple qualities of attention for timely action. In Reason, P., & Bradbury, H. (Eds.), *The Sage handbook of action research* (2nd ed.), 239–251. London, UK: Sage.

Trompenaars, F., & Voerman, E. (2009). *Servant leadership across cultures: Harnessing the strength of the world's most powerful leadership philosophy*. Oxford, UK: Infinite Ideas.

Walling, C. (2013). Appreciative inquiry: How to find and leverage what's right in your workplace. *The Canadian Manager, 38*(3), 8–9,4. Retrieved from https://ezproxy.royalroads.ca/login?url=http://search.proquest.com/docview/1441434767?accountid=8056

Weil, S. (1999). From being about something to being for somebody: The ongoing

transformation of the American museum. *America's Museums, 128*(3), 229–258. Retrieved

from http://www.jstor.org/stable/20027573

Weil, S. (2000, September). *Beyond management: Making museums matter.* Keynote address at

the first international conference on museum management and leadership, hosted by the

Canadian Museums Association, Ottawa. Retrieved from

http://www.intercom.museum/conferences/2000/weil.pdf

Wheatley, M. J. (2006). *Leadership and the new science: Discovering order in a chaotic world.*

San Francisco, CA: Berrett-Koehler.

Wheatley, M. J. (2007). *Finding our way: Leadership for an uncertain time.* San Francisco, CA:

Berrett-Koehler.

Yuhas, A. (2016, January 21). David Koch steps down from board of New York science

museum. *The Guardian.* Retrieved from https://www.theguardian.com/us-

news/2016/jan/21/david-koch-american-museum-of-natural-history-climate-change-fossil-

fuel-money

Appendix A: Canadian Museums Association—Mission, Vision, Values

From the CMA Strategic Plan 2015–2018, retrieved from:

http://museums.ca/uploaded/web/docs/CMA_Strategic_Plan_2015_2018.pdf

Vision: Museums are valued public institutions that inspire understanding and encourage solutions for a better world.

Mission: The CMA exists to advance Canadian museums to ensure meaningful connections with their communities by providing leadership, fostering a national museum community, and increasing the value of museums to society.

Values
- Leadership: We value enhancing the leadership skills of museum professionals at all levels to further the goals of the CMA and the museum community.

- Innovation: We support innovation for the association and the community and we seek different ideas and embrace new approaches to enhance the value of museums in society.

- Social benefit: We believe that museums exist to achieve public good.

- Inclusiveness: We embrace inclusion by respecting diversity and seeking different perspectives and opinions.

- Collaboration: We believe in the benefits of partnerships and working together to bring greater strength to the community as a whole.

- Membership: We value the participation of members, which strengthens our profession.

Appendix B: Listing of National Crown Corporation Museums

1. Canadian Museum of History (comprises Canadian War Museum) – Gatineau / Ottawa

2. Canadian Museum for Human Rights – Winnipeg

3. Canadian Museum of Nature – Ottawa

4. Canada Science and Technology Museums Corporation (comprises Canada Agriculture and Food Museum, Canada Aviation and Space Museum, Canada Science and Technology Museum) – Ottawa

5. National Gallery of Canada – Ottawa

6. Canadian Museum of Immigration at Pier 21 – Halifax

Appendix C: Inquiry Team Member Letter of Agreement

In partial fulfillment of the requirement for a Master of Arts in Leadership Degree at Royal Roads University, Naomi Grattan will be conducting an inquiry research study with the Canadian Museums Association (CMA) to investigate the future of leadership in Canadian museums. My credentials with Royal Roads University can be established by contacting Dr. Catherine Etmanski, Acting Director, School of Leadership Studies: [email address] or [phone number].

Inquiry team member role description
As a volunteer Inquiry Team Member assisting the Student with this project, your role may include one or more of the following: providing advice on the relevance and wording of questions and letters of invitation, advising on current relevant literature, supporting the logistics of the focus group, reviewing analysis of data, to assist the Student and the CMA organizational change process. In the course of this activity, you may be privy to confidential inquiry data.

Confidentiality of inquiry data
In compliance with the Royal Roads University Research Ethics Policy, under which this inquiry project is being conducted, all personal identifiers and any other confidential information generated or accessed by the inquiry team advisor will only be used in the performance of the functions of this project, and must not be disclosed to anyone other than persons authorized to receive it, both during the inquiry period and beyond it. Recorded information in all formats is covered by this agreement. Personal identifiers include participant names, contact information, personally identifying turns of phrase or comments, and any other personally identifying information.

Personal information will be collected, recorded, corrected, accessed, altered, used, disclosed, retained, secured and destroyed as directed by the Student, under direction of the Royal Roads Academic Supervisor.

Inquiry Team Members who are uncertain whether any information they may wish to share about the project they are working on is personal or confidential will verify this with Naomi Grattan, the Student.

Statement of informed consent:

I have read and understand this agreement.

_____   _____   _____
Name (please print)   Signature   Date

Appendix D: Interview Selection Criteria

- What is your current title and where do you work? Are you, or is the organization you work for, a CMA member?

- How many years have you worked in the museum sector?

- Do you self-identify as a museum professional?

- Do you see yourself working in the sector in 5-10 years?

- Are you interested in concepts related to leadership?

Appendix E: Interview Letter of Invitation

Dear [First Name, Last Name],

I write to invite you to be part of a research project that I am conducting as part of the requirement for my Master's Degree in Leadership, at Royal Roads University in Victoria, British Columbia.

The objective of my research project is to investigate, with the support of the Canadian Museums Association (CMA), how the CMA could facilitate leadership development in the Canadian museum sector. The CMA is my project sponsor, and my committee is comprised of Dr. Catherine Etmanski (Royal Roads University) and Dr. Robert R. Janes (editor emeritus *Museum Management and Curatorship*, University of Calgary).

I am interested in speaking with a cross section of CMA members about their experience with museum leadership, and vision for the future of museums in Canada.

This phase of my research project will consist of a series of 50-minute interviews, by online video conferencing (e.g., Skype or FaceTime), with volunteers from across the country. You are receiving this invitation because of your experience and reputation within the museum sector lead me to believe that you will be curious about this topic and interested in the discussion.

The attached document contains further information about the study conduct and will enable you to make a fully informed decision on whether or not you wish to participate. Please review this information before responding.

Please note that you are not required to participate in this research project. I am aware that in some cases potential collegial relationships may cause potential participants to feel compelled to participate, however, your participation is voluntary and your choice whether or not they participate will not affect your relationship with me, or your employment status in any way. If you do choose to participate, you are free to withdraw at any time without prejudice. And of course, if you do not wish to participate, simply do not respond to this request.

Please feel free to contact me at any time should you have additional questions regarding the project and its outcomes.

If you would like to participate in this research project, please contact her before May 30, 2016 at: [email address] or [phone number].

Sincerely,

Naomi Grattan

Appendix F: Inquiry Information Letter

An Inquiry About Leadership and Canadian Museums

My name is Naomi Grattan, and this research project is part of the requirement for a Master's Degree of Arts in Leadership at Royal Roads University. My credentials with Royal Roads University can be established by contacting Dr. Catherine Etmanski, Acting Director, School of Leadership Studies: [email address] or [phone number].

Purpose of the study and sponsoring organization
The purpose of my research project is to investigate the future of leadership for museums in Canada, and to identify ways the Canadian Museums Association (CMA) can support leadership development among the membership.

Your participation and how information will be collected
The research will consist of a series of 50-minute interviews with a cross section of museum professionals from across the country. A short list of interview candidates will be invited to participate using a purposive sampling technique. My second committee member, Dr. Robert Janes, will assist me in identifying approximately 20 potential interview participants based on their experience in Canadian museums and our belief that: they are CMA members, self-identify as museum professionals, have worked in the field for at least ten years, and are likely to continue working in the field. In that list we will seek a balance across gender, geography, discipline (i.e., curatorial, education, operations, etc.) and age. Participation will be based on convenience: the first six respondents will comprise the interview candidates. I will then confirm participation using those same basic questions:

- Are you, or is the organization you work for, a CMA member?
- How many years have you worked in the museum sector?
- Do you self-identify as a museum professional?
- Do you see yourself working in the sector in 5-10 years?

Data collected through the interviews will be anonymized and coded for themes. Following the interviews, the major themes and ideas from the interviews will be shared in a focus group with CMA staff members, who will then have the additional opportunity to generate further input and ideas. Again, individual contributions to the focus group will be anonymized.

The results from both the interviews and the focus group will then be shared with CMA board members to generate a list of potential actions and activities for the organization to adopt.

The interviews and focus group will explore the following questions:
1. What stories of leadership success do members of the CMA tell?
2. What is the CMA member's vision for Canadian museums 10 years from now?
3. What kind of leadership do we need to realize that vision?
4. What kind of professional development might be required?
5. How might the CMA develop this leadership in Canada?

Benefits and risks to participation

I hope to achieve several benefits for both the CMA, and Canadian museum workers. First, I hope to make a meaningful contribution to our national dialogue regarding museum leadership for the 21st century. Second, I seek to support the CMA in their work as outlined in the *2015–2018 Strategic Plan*, which stated that two of the three major trends facing the sector are "changes to the workforce, and the need for more professional development opportunities at every stage." The plan further identifies six core values for CMA, and leadership is listed first. Third, I hope to generate some new and practical ideas for activities and actions that the CMA could undertake in service of the membership.

The risks to participating in the study are minimal, given that as the researcher, I am the only one who will know who chooses to participate in interviews. However, given the nature of focus groups, participation in this method will not be anonymous. There is the risk that we will generate ideas that cannot be acted upon, for reasons of resources, which may be frustrating. Please see the confidentiality section below for further details on data management.

Further, should you choose to volunteer, you may choose to remove yourself from the study at any time, at which time any data collected will be immediately destroyed.

Inquiry team

I am being helped in the development of this project by several volunteers:
- Alexandra Hatcher, Director of Site Operations for Alberta's historic sites and museums, and former Executive Director of the Alberta Museums Association
- Lisa Making, Director of Exhibitions and Communications for the Royal Tyrrell Museum
- Crystal Willie, museum consultant

The inquiry team will serve as test candidates for piloting my data collection methods, advise on relevant literature, and serve as a test audience for the themes that emerge from the coded data. The third member of my inquiry team will be a CMA staff member to help coordinate the focus group and board session. All of my inquiry team members will be required to review and sign the inquiry team member confidentiality agreement.

Real or perceived conflict of interest

I have worked in the Canadian museum sector for most of the last 15 years, including four years as director of communications for the CMA, which some of you may recall. At this time however, I am working as an independent arts consultant in Calgary. This project is something I elected to pursue independently based on the intersection of my interest in leadership, and my love of Canada's museums. I am not being compensated by any agency to undertake this work. I

disclose this information here so that you can make a fully informed decision on whether or not to participate in this study.

Confidentiality, security of data, and retention period
I will work to protect your privacy throughout this study. Interviews will be recorded, transcribed, and then anonymized before coding such that no content will be attributable to any individual participant. Further, the focus group discussion will also be transcribed and anonymized such that content will not be attributable to any individual participant.

All information I collect throughout the study will be maintained in confidence with hard copies (e.g., consent forms) stored in a locked filing cabinet in my home office. Electronic data (such as transcripts or audio files) will be stored on a password protected computer on my home computer. Information will be recorded audio recorded and, where appropriate, summarized, in anonymous format, in the body of the final report. At no time will any specific comments be attributed to any individual unless specific agreement has been obtained beforehand. All documentation will be kept strictly confidential.

Data collected through the study will be kept for one year following completion of the research, at which time it will be destroyed. Please note that the data/information related to any individual who elects to withdraw from the interviews will be destroyed immediately. However, note that due to the nature of focus groups, it is not possible to keep identities of the participants anonymous from the researcher, facilitator, or other participants. All participants will be asked to respect the confidential nature of the research by not sharing names or identifying comments outside of the group.

Sharing results
I will submit my final thesis to Royal Roads University in partial fulfillment for a Master of Arts in Leadership, which the University will publish. I will also share my research findings with the CMA, and hope to publish a summary of the results in *Muse*, the bimonthly magazine of the CMA, and give a session at the CMA conference in 2017. I also hope to publish in other sector journals including *Curator* and *Museum Management and Curatorship.* If participants are interested in a copy of the final research paper, or the summary, I will also share the complete publication upon request.

Procedure for withdrawing from the study
To withdraw from the study, participants may simply let me know. As noted above, any data related to interviews will be immediately destroyed and no records will be kept. In the case of the focus group, any participants who wish to withdraw from the process may do so at any time; however, due to the group nature of the process it might not be possible to identify individual comments in order to remove them.

You are not required to participate in this research project. By completing the consent form (by email for interviews, and in-person for the focus group) for participation you indicate that you have read and understand the information above and give your free and informed consent to participate in this project. Please keep a copy of this information letter for your records.

Appendix G: Interview Consent Form

By signing this form, you agree that you are over the age of 19 and have read the information letter for this study. Your signature states that you are giving your voluntary and informed consent to participate in this project.

☐   I consent to the audio recording of the interview.

Name (please print): _____

Signed: _____

Date: _____

Appendix H: Interview Guide

- Thank you for your interest in participating in this study. I want to remind you that you are free to withdraw at any time, and if you choose to do so, any data related to your participation will be destroyed.

- Tell me about your career history. How did you get involved in museum work? What brings you the most joy in your work?

- Tell me about your career goals. What do you look forward to in your career?

- Tell me about a positive experience you have had with leadership?

- What is your vision for museums ten years from now? What kind of leadership will museums in Canada need to be relevant to Canadians ten years from now?

- What kind of professional development opportunities might facilitate your vision for Canadian museums?

Appendix I: Focus Group Letter of Invitation

Dear CMA staff,

I write to invite you to be part of a research project that I am conducting as part of the requirement for my Master's Degree in Leadership, at Royal Roads University in Victoria, British Columbia.

The objective of my research project is to investigate, with the support of the Canadian Museums Association (CMA), how the CMA could facilitate leadership development in the Canadian museum sector. The CMA is my project sponsor, and my committee is comprised of Dr. Catherine Etmanski (Royal Roads University) and Dr. Robert R. Janes (editor emeritus *Museum Management and Curatorship*, University of Calgary).

I have interviewed a cross section of CMA members about their experiences with museum leadership, and their vision for the future of museums in Canada.

I would like to share the results of these interviews with you as a group, and to explore the same interview questions about your experiences with leadership and your visions for the future of museums in Canada. This phase of my research project will consist of a half-day focus group in your offices in Ottawa in September. This focus group will only include staff members; the Executive Director will not participate to eliminate any power over issues.

The attached document contains further information about the study conduct and will enable you to make a fully informed decision on whether or not you wish to participate. Please review this information before responding.

Please note that you are not required to participate in this research project. I am aware that in some cases potential collegial relationships may cause potential participants to feel compelled to participate, however, your participation is voluntary and your choice whether or not they participate will not affect your relationship with me, or your employment status in any way. If you do choose to participate, you are free to withdraw at any time without prejudice. And of course, if you do not wish to participate, simply do not respond to this request.

Please feel free to contact me at any time should you have additional questions regarding the project and its outcomes.

If you would like to participate in this research project, please contact her before May 30, 2016 at: [email address] or [phone number].

Sincerely,

Naomi Grattan

Appendix J: Focus Group Consent Form

By signing this form, you agree that you are over the age of 19 and have read the information letter for this study. Your signature states that you are giving your voluntary and informed consent to participate in this project.

☐   I consent to the audio recording of the focus group.

☐   I commit to respect the confidential nature of the focus group by not sharing identifying information about the other participants.

☐   I consent to photos being captured for documentation purposes only. I understand that these images will not be used for marketing or publication purposes. I understand that I will be contacted again in the future should the Research Team wish to use any image of me for a secondary purpose, for example in presenting this research at the Canadian Museums Association annual conference.

-OR-

☐   I do NOT consent to photos of me being captured for documentation purposes only; however, I do consent to being audio recorded during my participation in the interview focus group. I understand that due to the group nature of this study, the audio recording will be ongoing throughout the focus group and my voice or image cannot easily be removed.

Name (please print): _____

Signed: _____

Date: _____

Appendix K: Focus Group Guide

- Briefly, tell the group about your career history. How did you get involved in museum work? What brings you the most joy in your work?

- Can you share a positive experience you have had with leadership? If it was unique how might it be replicated?

- What is your vision for museums ten years from now? What kind of leadership will museums in Canada need to be relevant to Canadians ten years from now?

- What kind of professional development opportunities might facilitate your vision for Canadian museums?

- Here are the major themes and ideas that emerged from the interviews, and the major themes and ideas that emerged from the literature review.
    - How could the CMA draw on these themes to create value for members?
    - Where does the CMA have planned activities or actions that could be amplified or added to in light of these ideas?

Appendix L: Current CMA Board Members

Manon Blanchette, CMA President
Chief Operating Officer, Pointe-à-Callière, Musée d'archéologie et d'histoire de Montréal

Karen Bachmann, CMA Vice-President
Director/Curator, Timmins Museum: National Exhibition Centre

Gerry Osmond, CMA Vice-President
Manager, Provincial Historic Sites of Newfoundland and Labrador

Barb Cameron, Director, Prince of Wales Northern Heritage Centre

Jane Fullerton, CEO, New Brunswick Museum

Susan Burrows Johnson, CEO/Executive Director, Galt Museum and Archives

Jack Lohman, CEO, Royal British Columbia Museum

David Marskell, CEO, THEMUSEUM, Kitchener-Waterloo

Nancy Noble, Director and CEO, Art Gallery of Nova Scotia