

Final Agenda
Current Issues in Museum Management Seminar 2008:
Strategy and Skills-building
October 1 – 4, 2008 Seattle, Washington
(Updated September 9, 2008)

Day 1: Wednesday, October 1– Pre-Conference Workshops

9 a.m. – Noon

HR Boot Camp: What You Don't Know Will Hurt You!

Facilitators:

Ellen Corradini, Human Resources Director, Corning Museum of Glass, Corning NY
Charlotte Montgomery, Director of Resource Allocation, Illinois State Museum, Springfield, IL

Human Resources has become a vast and complex field. New laws are enacted every month. Violation of these laws, even unintended, can cost an organization thousands or even millions of dollars. This “HR 101” session is designed for directors, assistant directors, managers and supervisors in any field, HR practitioners new to the field, and anyone who needs a basic review of HR practices and laws.

In this interactive session, we will discuss employment practices, including interviewing and selection, wage and hour laws, employee handbooks, required postings, job descriptions, recordkeeping, harassment, and termination. Ample time will be given for questions and discussion. After participating in this session, Attendees will be better able to:

- More clearly understand what labor laws and practices apply to their organization
- Identify and address the types of situations that could cause morale and/or legal problems for their organization
- Access valuable and up-to-date information regarding HR policies and laws

1 – 4 p.m.

Finance Essentials Boot Camp

Facilitator:

Jane Piasecki, Chief Financial Officer, Laguna Playhouse, Laguna Beach, CA

If you are staff with a non-financial background, or if you are new to a position that requires you to manage people, projects and budgets, this “boot camp” session is for you! In addition to providing you useful, practical tips on reading financial reports and understanding their purpose and limitations, this session will help you be better able to:

- Make sense of the terms and concepts used in managing the financial aspects of a museum
- Gain insight on the budget process
- Discuss the financial information needed to effectively run a museum operation.

Day 2: Thursday, October 2– Strategic Planning and Execution

8–9 a.m.

Registration

Coffee and Conversation

AAM Bookstore

9–9:30 a.m.

Opening Remarks

Greg Stevens Assistant Director, Professional Education, AAM

Walter L. Crimm, Vice President, Cultural Design Group, EwingCole, Philadelphia

“The Journey to the Emerald City”

You are setting off for new places in strategic planning and communication. The tale begins when you decide to make change and you must be prepared to move out of your comfort zone to a new place, meeting and bringing along (or leaving behind) key stakeholders from within and outside of your organization. With a plan, the road might be clear, but the path is not always easy. Join Walt Crimm in this light-hearted (but serious!) look at why strategic planning and communication are good for you.

9:30–10:45 a.m.

Plenary Session: Creating and Implementing Vision

Facilitators:

John Durel, Organizational Consultant and Leadership Coach, Qm2/Durel Consulting Partners, Baltimore, MD

D. Lynn McRainey, Elizabeth F. Cheney Director of Education, Chicago History Museum

John Russick, Senior Curator, Chicago History Museum

This session will help guide you in communicating a compelling vision that aligns stakeholders behind your strategy. Join John Durel and colleagues from the Chicago History Museum (CHM) in a lively discussion about the CHM visioning process. Facilitators will explore the CHM visioning process and its resulting document, *Claiming Chicago, Shaping Our Future*, as a necessary prelude to successful strategic planning and execution. John, Lynn and John will discuss the path toward institutional self reflection and discovery rooted in and inspired by enduring core purpose and values while capturing the imagination and challenging the institution with bold aspirations for the future in a strategic, relevant and sustainable way.

10:45–11 a.m.

Coffee and Conversation

AAM Bookstore

11 a.m.–12:15 p.m.

Strategic Institutional Planning

Facilitator: John Durel

What does it mean to be strategic? Building on the plenary discussion, this session will address how to translate high concepts into practical action. Developing a strategic plan requires an understanding of how a museum delivers value in exchange for financial support, and how it can build its capacity to respond to external forces in order to maximize both value and revenue. The plan should function as a framework for making decisions and taking actions that drive the organization forward. In an environment of increased competition, funding cuts, and other pressures, strategic planning is a sound management tool for museums.

12:15–2:15 p.m.

Lunch on your own

AAM Bookstore

Grab a colleague or two and walk to one of Seattle's great downtown restaurants.

2:15–5 p.m.

Strategic Alignment and Execution

Facilitator: John Durel

The strategic plan won't change a thing unless the organization is aligned to the plan's goals and priorities. Once a strategic plan is in place it should be used to create the annual budget, departmental and individual work plans, performance reviews, a board development plan, fundraising plan, and marketing plan. Successful execution requires discipline, focus, coordination, frequent communication, tracking results, and making adjustments as needed. This powerful exploratory session and planning workshop is designed to help you identify the challenges to and benefits of closing the gap between strategic planning and execution.

3:30–3:45 p.m.

Coffee and Conversation

AAM Bookstore

5:30–7 p.m.

Reception (Hosted by AAM at the hotel)

Join colleagues old and new for drinks and light snacks at the hotel before heading off to dinner at one of Seattle's great restaurants! Many places are within walking distance (and the bus service downtown is free)!

Day 3: Friday, October 3– Building the Bridge between Strategic Planning and Communication

8–9 a.m.

Coffee and Conversation
AAM Bookstore

Early Bird Roundtable Discussions

Moderator: Greg Stevens

Are you an early riser? Just can't get enough management content? Stayed awake all night with that perplexing strategic planning and alignment question burning inside your head? Come join a focused, small-group informal discussion about topics that are most important to you. Topics include:

- ***How Do I Create Vision for My Institution?***

Facilitators: D. Lynn McRaine and John Russick

To create a vision for your museum you must first look inward to find the institution's true nature. But the process of divining your museum's core purpose and values, building institution-wide agreement on them, and finding the opportunities they offer for forward movement and adventurous thinking takes energy, honesty, lots of listening, and your imagination.

- ***Strategic Planning and Implementation Q and A***

Facilitators: John Durel, Betty Brewer, and Walt Crimm

Take this opportunity to share strategic planning and implementation ideas, concerns, successes and flops with your peers, or ask those burning questions that kept you up all night.

- ***Communicating and Managing Across Four Generations***

Facilitator: Greg Stevens

Traditionalists, the Boomers, Gen X, and Millennials. Who are they? Each generation has unique characteristics which have a direct impact on how we work together, and how we plan for the future of museum leadership. Learn more about how you can better identify, respond to, and communicate across generations. Share ghastly tales and glowing successes that are sure to resonate with everyone!

- ***Burning HR Q and A***

Facilitators: Ellen Corradini and Charlotte Montgomery

Spend informal time sharing ideas and strategies or asking HR-related questions, about interviewing and selection, wage and hour laws, benefits, employee handbooks, required postings, job descriptions, recordkeeping, harassment, termination, etc.

Please note: this informal discussion is not intended to be a comprehensive replacement for the HR Boot Camp workshop on Wednesday morning.

- **Finance Essentials Q and A**

Facilitator: Jane Piasecki

This Early Bird roundtable discussion session is an opportunity for you to discuss budget challenges and success or to ask questions of peers in order to better manage the financial aspects of your institution.

Please note: this informal discussion is not intended to be a comprehensive replacement for the Finance Essentials Boot Camp workshop on Wednesday morning.

- **Teams and Conflicts**

Facilitator: Gary Ford, GLFord Consulting, Seattle WA

Join this informal conversation to discuss the challenges of building effective teams, identifying and responding to conflicts within and across teams, decision-making, and information flow that all impact communication in a group dynamic.

9–9:15 a.m.

Morning Remarks

Greg Stevens

9:15–10:15 a.m.

Morning Plenary:

Building the Bridge between Strategic Planning and Communication

Facilitators:

John Durel

Gary Ford, Management Consultant, GLFord Consulting, Seattle, WA

This opening session will help guide you in communicating a compelling vision that aligns stakeholders behind your strategy. John Durel and Gary Ford lead the day off by building the “bridge” between strategic planning and implementation and the necessary communication strategies built into any planning process. Having the right strategy is not all you need to ensure stakeholder buy-in and commitment to strategic planning outcomes across your organization. To better ensure success, communication, information flow and understanding decision rights is key. This session will briefly introduce ways to assess current team and stakeholder dynamics to determine how motivated the group to execute the strategy at hand; and how you can lead them to a place of higher commitment and effective communication.

10:15–10:45 a.m.

Coffee and Conversation

AAM Bookstore

10:45 a.m.–12:15 p.m.

Strategic Decision-making

Facilitators:

Gary Ford

Ralph Bufano, Principal, Bufano Management Company, Mercer Island, WA

Greg Stevens

Current research shows that successful strategic planning and execution starts with clarifying decision rights and making sure information flows where it must go at all levels of the institution. Understanding the nature of decision making and putting it into practice is essential and is considered at the top of the list of fundamental traits of organizational effectiveness. At the end of this session, participants will have clear processes to:

- Identify who the stakeholders are for a given decision
- Consider the factors that affect decision rights
- Assess stakeholder commitment to strategic planning outcomes
- Ensure consistent communication of decisions across the organization

12:15–1:30 p.m.

Lunch (hosted by AAM at the hotel)

AAM Museum Management Committee Business Meeting

AAM Bookstore

1:30–3 p.m.

Understanding Team Dynamics

Facilitator: Gary Ford

Do the departments in your museum operate in silos or do teams play well together? How much are poor team dynamics affecting the operation of your institution that ultimately affects your audiences? Increasingly, museums are shifting away from “old-school” hierarchical organizational structure and toward cross-functional teams. Gary Ford will discuss how museum leaders can build effective teams by maximizing gains and minimizing losses from team dynamics. By participating in this session, attendees will be better able to:

- Identify dynamics that short-circuit team effectiveness
- Decrease tribalism between interdependent teams who aren’t playing well together.
- Accelerate the building of trust, ability to engage in productive debate, and the prioritization of team goals over individual interests.

3–3:15 p.m.

Coffee and Conversation

AAM Bookstore

3:15–5 p.m.

Conflict Resolution: What Can Leaders Do?

Facilitator: Gary Ford

Do your departments, work groups or cross-functional teams engage in honest communication, or is what you experience or observe “artificial harmony”? Do the most open discussions happen in your meetings or within a subset of the team behind closed doors after the meeting. The truth is, groups that engage in open, unfiltered debate are more likely to commit to group decisions, more likely to hold one another accountable for agreed upon strategy, and more likely to execute strategies that prioritize institutional goals over individual interests. What can you as a leader do to foster a culture of unfiltered debate and productive conflict? Participants in this session will learn how to better:

- Shift their employees to a place where they are more willing to productively tackle their own conflict.
- Coach their employees to broach difficult topics effectively
- Create a culture in the mid-term where managers aren’t called upon to play referee
- Use a simple form of managerial mediation in extreme instances

Day 4: Saturday, October 4– Putting it Together

8–9 a.m.

Coffee and Conversation
AAM Bookstore

Early Bird Roundtable Discussions
Moderator: Greg Stevens

Are you an early riser? Just can't get enough management content? Stayed awake all night with that perplexing question burning inside your head? Come join a focused, small-group informal discussion about topics that are most important to you. Topics include:

- ***Team Talk and Conflict Chat***

Facilitator: Ellen Corradini

What are some of the real-life team conflict challenges you face in your institution? What are some of your successful (or not-so-successful) strategies? Come share the wealth of experience in our midst!

- ***How Do I Create Vision for My Institution?***

Facilitators: Lynn McRainey and John Russick

If institutional vision is rooted in and inspired by enduring core purpose and values, how do you help your institution capture the imagination and challenge itself with bold aspirations for the future in a strategic, relevant and sustainable way? Let's talk!

- ***Strategic Planning and Implementation Q and A***

Facilitators: Betty Brewer and Walt Crimm

Have you defined your institution's strategic focus areas? If a new opportunity comes along, what filters do you process it through to decide whether to "go for it?" Join colleagues to talk about strategic decision-making within your institution – what works, what doesn't.

- ***Communicating Across Four Generations***

Facilitator: Greg Stevens

Traditionalists, the Boomers, Gen X, and Millennials. Who are they? Each generation has unique characteristics which have a direct impact on our museums, how we operate and work together, and how we plan for the future of museum leadership. Learn more about how you can better identify, respond to, and communicate across generations in your institution. Share ghastly tales and glowing successes that are sure to resonate with everyone!

- **Strategies for Attracting and Retaining Valuable Staff**

Facilitator: Charlotte Montgomery

Spend informal time sharing ideas and strategies to attract and retain valuable staff during times of economic woes. Discover what other institutions are doing when faced with limited budgets to compete in today's marketplace. Gain an understanding of the benefits that do not add to your bottom line as well as an appreciation for which benefits offer the most bang for your buck. **Please note: this informal discussion is not intended to be a comprehensive replacement for the HR Boot Camp workshop on Wednesday morning.**

- **Finance Essentials Q and A**

Facilitator: Jane Piasecki

This Early Bird roundtable discussion session is an opportunity for you to discuss budget challenges and success or to ask questions of peers in order to better manage the financial aspects of your institution.

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9–9:15 a.m.

Morning Remarks

Greg Stevens

9:15–10:45 a.m.

HR Legal Update

Facilitator: Mark W. Berry, Partner, Davis Wright Tremaine LLP, Seattle, WA

Employment law attorney Mark Berry will discuss the latest developments in the laws affecting complex employment relationships that can affect museums. He will explore the latest revisions to federal leave laws and other statutory and regulatory changes, recent significant court decisions and the latest trends. His presentation may also highlight the thorny issues surrounding privacy in the workplace and managing attendance in the face of employees' various rights to be absent from work.

10:45–11 a.m.

Break

AAM Bookstore

11 a.m.–12 p.m.

Strategic Planning and Communication: Looking Back and Looking Forward

Facilitator: Greg Stevens

Wrap up the CIMM 08 seminar learning experience by connecting the dots between strategic planning and communication, and considering the challenges ahead as you return to the real world.

12–1 p.m.

AAM Bookstore