

**Are Museum Governing Boards Using *Excellence and Equity*?**

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## Executive Summary

In 1992, the American Association of Museums (AAM) published *Excellence and Equity: Education and the Public Dimension of Museums*. The report helped focus the field's attention on the idea that museums must better listen, reflect, and react to the needs of their local communities. The AAM advocated that museums should include the many elements of their communities in all operations and programs, and recommended ten specific ways for museums to commit to the policies of excellence and equity in their operations. To lead an organization successfully to this new focus, a museum's governing authority would need to commit to these principles, and dedicate the museum's resources to this purpose.

The report strongly influenced how museums define their place in the community. However, while museum professionals continue to discuss the results of *Excellence and Equity* at conferences and in museum journals, there are not many case studies of specific institutions' pursuit of diversity at the governing authority level. While this paper does not fill the need for case studies, it attempts to research current practices and the resources currently available to the field. It also illustrates how governing boards at two specific institutions, the San Diego Museum of Natural History and the Strong Museum in Rochester, New York, approached diversity.

I devised a survey and asked Pamela Bruder, trustee emeritus at the San Diego Museum of Natural History, and Rollie Adams, CEO of the Strong Museum, to complete it. The survey questioned the board's structure, procedures, recruitment, planning process, and attitudes toward diversity. Once both responded, I compared the two museums' practices at the board level. The museums share neither discipline, nor budget size, nor geographic

location, but they do share certain attitudes about inclusive policies at the board level. See Table 2.

	Strong Museum <sup>1</sup>	San Diego Museum of Natural History <sup>2</sup>
Discipline	History	Natural History
Location	Rochester, NY	San Diego, CA
Operating Budget	ca. \$7,500,000	ca. 11,500,000

While some of their attitudes and behaviors did not match my expectations, these museums' abilities to meet community needs demonstrate that their diversity programs are successful.

One interesting difference between Pamela Bruder's and Rollie Adams' responses was their attitudes toward the effect of a diverse governing authority on museum operations. Both agreed that a diverse board is insufficient to meet community needs; instead, the museum's outreach, programs, and attitudes must welcome the entire community. Rollie Adams believes that strategic planning leads to this type of change, and while he recognized the importance of a diverse board, he discounted its impact. Pamela Bruder, while acknowledging that solely having a diverse board is inadequate, cited instances where having a representative of a particular audience on the board of trustees helped to start a conversation with that audience. While that person's membership on the board was not enough by itself, it opened the door to communication. I think that these two opinions demonstrate the differing attitudes of museums' executive directors and trustees.

Both the San Diego Museum of Natural History and the Strong Museum pursued equity for their communities prior to the publication of *Excellence and Equity*. Community-based programs have been a goal at the Strong Museum since 1982; in 1989, the Strong Museum created a long-range plan that included a goal of making "the museum an essential

<sup>1</sup> 1998 IMLS General Operating Support grant application, Strong Museum, January 15, 1998, i.

<sup>2</sup> 1998 IMLS General Operating Support grant application, San Diego Museum of Natural History,

community resource.”<sup>3</sup> The arrival in 1991 of director Dr. Michael Hager caused the San Diego Museum of Natural History to evaluate operations and plan strategically to meet their community’s changing needs, leading to the revision of the Museum mission statement in August 1992.<sup>4</sup> Trustee Pamela Bruder reports that diversity had been a topic at board meetings since her election in 1983, and possibly before.<sup>5</sup> Both museums consulted the report to confirm that their operations conformed to its recommendations; however, the publication was not an introduction to inclusiveness for either institution. I concluded that while *Excellence and Equity* has been an important tool for museums, the conversation about inclusiveness started not from its publication, but because of the emerging standards in the museum field. The San Diego Museum of Natural History and the Strong Museum have succeeded in their efforts toward inclusiveness in part because they considered this topic prior to AAM’s publication of *Excellence and Equity* ten years ago.

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January 15, 2000, i.

<sup>3</sup> 1998 IMLS General Operating Support grant application, Strong Museum, January 15, 1998, i.

<sup>4</sup> 1998 IMLS General Operating Support grant application, San Diego Museum of Natural History, January 15, 2000, i.

<sup>5</sup> Pamela Bruder, governance survey to author, May 2, 2001.

## **Are Museum Governing Boards Using *Excellence and Equity*?**

In 1992, the American Association of Museums (AAM) published the report *Excellence and Equity: Education and the Public Dimension of Museums*, based upon the work of a task force and conversations with the museum field. The report articulated that museums are places of learning that benefit their communities, and charged museums to improve their public service to meet the educational needs of all community members. *Excellence and Equity* urged museums to become "inclusive places that welcome diverse audiences," and offered ten recommendations as guides.<sup>6</sup> Now, in 2001, museums have had almost ten years to study and implement the recommendations in *Excellence and Equity*. In this paper, I will consider the eighth recommendation: diversify volunteers, staff, and board members to better represent the community.<sup>7</sup> I will focus on museums' governing bodies, which set the museum's vision and are responsible for operations. I will examine how specific boards approached diversity within their institutions, determine if or how a commitment to diversity affected operations, and consider if their commitment was successful.

In the past ten years, museums have fought to change their reputation as elite institutions. AAM has used its resources to help museums improve their relationships with their communities through the "Museums and Communities" initiative, and the AAM's annual meeting regularly uses a community-centered conference theme and features sessions about service to the community. In addition to AAM's work, major funders such as the Institute of Museum and Library Services, the National Endowment for the Humanities, and

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<sup>6</sup> American Association of Museums, *Excellence and Equity: Education and the Public Dimension of Museums* (Washington, DC: AAM, 1992) 3.

<sup>7</sup> American Association of Museums, *Excellence and Equity: Education and the Public Dimension of Museums* (Washington, DC: AAM, 1992) 22.

the Ford Foundation provide grant money to support new programs that target underserved populations. While museums actively target and welcome broad segments of their communities to programs and exhibits, community members' increased participation as volunteers, staff, and board members has proved more difficult to affect. As Mindy Duitz, then director of the Brooklyn Children's Museum, wrote in 1992,

In looking at the board of directors, we recognized the need for more diverse representation [. . .]. We are particularly interested in recruiting board members from among those in prominent positions in the business community, which has proven to be very difficult since the obvious candidates are few and in great demand. Another complication lies in achieving a balance between the desire for local representation and the pressing need for a well-connected board.<sup>8</sup>

Duitz specifically comments upon an obstacle governing boards face when they attempt to diversify: the dual, and not always compatible, responsibilities of strategic leadership and fundraising. While many museums include diverse community members on advisory boards as a forum for their opinions, these community members are not always able to contribute to the museum financially, which may limit access to membership on the Board of Trustees.

*Excellence and Equity* was one of the first publications to codify the practice of inclusiveness. The AAM advocated that museums should include the many voices from their communities in all operations and programs, and recommended ten specific ways for museums to commit to the policies of excellence and equity in their operations. Included in the ten recommendations were emphases on education as central to the museum's public service role, the broadening of cultural and intellectual interpretation perspectives, and the

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<sup>8</sup> Mindy Duitz, "The Soul of a Museum: Commitment to Community at the Brooklyn Children's Museum," *Museums and Communities: the Politics of Public Culture*, ed. Ivan Karp, Christine Mullen Kreamer, and Stephen Lavine (Washington, DC: Smithsonian Institution Press, 1992) 249.

achievement of diversity within museum trustees, staff, and volunteers.<sup>9</sup> The report elaborates:

If museums are to be welcoming places for people of different racial, ethnic, social, economic, and educational backgrounds and if they are to use their collections to present a variety of perspectives, they must recruit, hire or select, and foster the professional growth of trustees, staff, and volunteers who reflect diverse audiences and multiple perspectives.<sup>10</sup>

To lead an organization successfully to this new focus, a museum's governing authority needs to commit to these principles, and dedicate museum resources to this purpose. True diversification takes board members' time to establish new relationships with community members. The board must consider what role they want new members to take within the board structure, and they must adapt their board orientation materials to reflect their commitment to represent the diverse community. The board should be prepared to establish new working relationships within the board setting. Museum consultant Daryl Fischer wrote in her book *Museums, Trustees, and Communities: Building Reciprocal Relationships* that the goal of diversification cannot simply be integration, but must be equitable.<sup>11</sup>

The museum field has discussed diversity and inclusiveness as goals for many years, meaning outreach to the different audiences within their communities in all aspects of museum operations. Museum professionals do not question the importance of these values. However, I think it is important to consider what diversity is, and what it means in terms of a governing board. In her book *Building Board Diversity*, Jennifer M. Rutledge comments that diversity should include not just visible differences, such as race or gender, but also cultural differences, such as values and customs. She lists some of the many ways people

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<sup>9</sup> AAM 8.

<sup>10</sup> AAM 22.

<sup>11</sup> Daryl Fischer, *Museums, Trustees, and Communities: Building Reciprocal Relationships*, Professional Practices Series of AAM and Museum Trustee Association (Washington, DC: AAM, 1997) 14.

differ: race, culture, national origin, region, gender, sexual orientation, age, marital status, politics, religion, ethnicity, physical ability, mental ability, family structure, socioeconomic status, and values.<sup>12</sup> While this list is by no means exhaustive, it introduces some of the many traits that boards need to consider when vetting new members. When considering why it is important to have people with these different traits serving on museum governing boards, one must remember that the board ultimately creates the long-range vision for the museum. While it is important that museums hear diverse voices from the community in an advisory role, for example when creating new programs, these voices need to be incorporated into the museum's governing bodies so they are heard during the planning process.

The American Association of Museums has attempted to lead by example with this issue of diversification and the governing authority. The AAM's 1998-2000 strategic plan (the most recent available to the public) includes a commitment to diversification at both the AAM and at museums throughout the United States. The AAM identified the "growth of a borderless global environment" as a challenge to museums, which must respond at the levels of governance, staffing, and programming in order to remain effective in their communities.<sup>13</sup> This new environment also serves as a challenge and goal to the AAM, which must incorporate new strategies to continue to serve the museum field effectively. Their strategic plan included seven strategies to help museums "anticipate and respond to issues so that they may succeed in serving communities' changing needs."<sup>14</sup> These strategies

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<sup>12</sup> Jennifer M. Rutledge, Building Board Diversity (Washington, DC: National Center for Nonprofit Boards, 1994) 7.

<sup>13</sup> American Association of Museums Strategic Agenda FY1998-2000, updated May 16, 2001, American Association of Museums, June 1, 2001 <<http://www.aam-us.org/strategicagenda.htm>>.

<sup>14</sup> American Association of Museums Strategic Agenda FY1998-2000, updated May 16, 2001, American Association of Museums, June 1, 2001 <<http://www.aam-us.org/strategicagenda.htm>>.

range from reaffirming the AAM's policy statements concerning diversity, to actively recruiting diverse nominees for the AAM Board, to providing scholarships to attend the AAM annual meeting, with a priority given to museum professionals of color.

The American Association of State and Local History (AASLH) is a second national organization that turned its attention to the issues of diversity and how museums can better meet community needs. AASLH provides support and leadership to its members, who preserve and interpret state and local history to make the past more meaningful to all Americans.<sup>15</sup> AASLH asks its member organizations to abide by a statement of ethics, including the expectation of “its members to assist the field in becoming more representative of our diverse society through equity in staffing, training, collecting, programming, and marketing. All professional activities, programs, products, and services shall be provided in such a way as to maximize access to all people.”<sup>16</sup> AASLH made an organizational commitment to furthering diversity in its member organizations, and plans to develop “a diversity program designed to ensure diverse staffs and boards in America's history institutions.”<sup>17</sup> This type of programming helps ensure that museums implement this practice, rather than merely discuss it.

Despite the attention focused on this issue, museums proved moderately successful creating diverse boards. The National Center for Nonprofit Boards (NCNB) collected data on board diversity in 1993 as part of a Ford Foundation grant, and independently in 1996 and 1999. Their research provides a snapshot of what nonprofits' governing bodies looked

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<sup>15</sup> Who We Are, American Association for State and Local History, June 1, 2001 <[www.aaslh.org/whoweare.htm](http://www.aaslh.org/whoweare.htm)>.

<sup>16</sup> Code of Ethics, American Association for State and Local History, June 1, 2001 <[www.aaslh.org/ethics.htm](http://www.aaslh.org/ethics.htm)>.

<sup>17</sup> Who We Are, American Association for State and Local History, June 1, 2001 <[www.aaslh.org/whoweare.htm](http://www.aaslh.org/whoweare.htm)>.

like at those times. NCNB's research included all types of not-for-profit organizations, not just museums. I compared the responses from 1993, a year following the AAM publication of *Excellence and Equity*, to those from 1999, after boards presumably considered and perhaps implemented recommendations from that publication. The 1993 and 1999 surveys are not identical; the 1999 survey does not include many of the questions that reference audience and board diversity used in the 1993 survey. Both years, responses from Arts and Culture organizations represented a small portion of total responses: 5.7 percent of 619 responses total in 1993,<sup>18</sup> and 6 percent of 1,347 in 1999.<sup>19</sup>

The 1993 survey focused on diversity issues. Of all respondents to this survey, 62.7 percent reported that the primary ethnic group in their geographic service area was White/Caucasian. The average board size was 21 members; of those 21 members, 16.7 members on average were White/Caucasian (79.5 percent). The least often reported board characteristics included Native Americans (.1 average), Asian American/ Pacific Islander (.3 average), Disabled (.5 average), and different sexual orientation (.6 average).<sup>20</sup> When reporting their definition of "diversity," 51.8 percent of respondents used visible differences like race, ethnicity, age, and gender. Only 2.6 percent of respondents included persons with disabilities in their definitions, and only 4.2 percent of respondents included varying religious backgrounds in their definitions.<sup>21</sup> A majority of respondents (71.8 percent) felt that it was important to have a culturally diverse board, but 90 percent of respondents believed that recruitment of diverse board members challenged their institution because their

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<sup>18</sup> Rutledge 43.

<sup>19</sup> National Center for Nonprofit Boards and Stanford Univ. School of Business, The Nonprofit Governance Index (Washington, DC: NCNB, 2000), 6-7.

<sup>20</sup> Rutledge 44.

<sup>21</sup> Rutledge 45.

audience was not diverse, perhaps meaning racial diversity.<sup>22</sup> Since 1993, awareness, discussion, and education about board diversity issues have increased; presumably, the 1999 NCNB survey would show an increase in reports of inclusive boards in not-for-profit organizations.

Despite the increase in information about inclusive board practices, the responses to the NCNB's 1999 survey did not demonstrate a marked increase in implementation. This could possibly result from the fact that only 6 percent of the 1,347 respondents represented arts and culture organizations, which most likely received the most exposure to the ideas of *Excellence and Equity* since 1992.<sup>23</sup> The 1999 results show a median board size of 17, and an average board size of 19.<sup>24</sup> Minorities comprise 15 percent of the board members represented by this survey, of which African Americans are 9 percent, Hispanic/Latino are 3 percent, Asian American are 2 percent, and other represents 1 percent.<sup>25</sup> Unlike the 1993 survey, NCNB did not ask the respondents about their definitions of diversity and their diversity practices. However, when asked if their boards represented their community in terms of age, sex, race, and ethnicity, "59 percent of respondents said that they do not. In order to correct the balance, 64 percent of those respondents indicated that they needed to diversify the board in general. Another 34 percent of respondents indicated that they need to add African Americans, Hispanics, women, young people, or constituents to the board."<sup>26</sup> Almost ten years after the publication of *Excellence and Equity*, 41 percent of the nonprofit boards surveyed by the NCNB responded that they accurately reflected their communities in terms of diversity. This percentage is almost identical to the response to a similar question

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<sup>22</sup> Rutledge 44.

<sup>23</sup> NCNB, *The Nonprofit Governance Index*, 6-7.

<sup>24</sup> NCNB, *The Nonprofit Governance Index*, 18.

<sup>25</sup> NCNB, *The Nonprofit Governance Index*, 13.

from the 1993 survey: when asked about satisfaction with the organization's achievement of board diversity, 41.2 percent of all respondents answered that they were satisfied.<sup>27</sup> The amount of materials available to non-profit organizations about diversification on the board level increased since 1993, but these two responses do not indicate an increase in implementation since the 1993 survey.

Board representation from all community segments is important because community support ultimately determines if the museum can survive, thrive, and have a meaningful community presence. A museum that does not meet its community's needs will not receive necessary financial support, whether from memberships, entrance fees, or local government. To ensure the satisfaction of community needs, the museum must involve members of the community in positions where they can lead change: in the governing authority, during strategic planning. In his book *A Place to Remember: Using History to Build Community*, Robert Archibald writes about his board at the Missouri Historical Society,

The composition of the board is a powerful external symbol of institutional ownership. While not-for-profits do not have shareholders who can claim ownership, we do have stakeholders. Our stakeholders are ideally the entire community. Thus if the goal is to assert community ownership, then the very composition of the board must reflect that objective. Who sits on the board is just as important to public perception as staffing, purchasing, contracting, and programming. A homogenous and exclusive board will undermine the most valiant attempts to present history as an inclusive discussion of enduring issues.<sup>28</sup>

When museums attempt to represent their entire community on their governing bodies, problematic areas must be carefully avoided. One example is tokenism. No person wants to feel that he or she was included on a governing board solely for one trait, for example, race

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<sup>26</sup> NCNB, *The Nonprofit Governance Index*, 12.

<sup>27</sup> Rutledge 45.

<sup>28</sup> Robert R. Archibald, *A Place to Remember: Using History to Build Community*, (Lanham: AltaMira Press, 1999), 193.

or sexual orientation. No person wants to represent or can represent his or her entire race or gender. Ideally, the governing board's commitment to diversity should be sufficiently broad to include more than one representative of a particular audience within its membership.

Self-evaluation is an important tool for boards wanting to diversify their membership. Jennifer Rutledge recommends the use of matrixes to recognize traits, skills, and attributes of current board members.<sup>29</sup> In addition to determining current skills, a matrix can identify areas of weakness. Using these results, boards can knowingly recruit new members when vacancies occur. Ideally, during the vetting process the board identifies potential members who fulfill multiple desired characteristics. Another self-evaluation tool is the Museum Assessment Program (MAP), funded in part by the Institute of Museum and Library Services (IMLS) and administered by AAM. In November 2001, AAM and IMLS will offer a new MAP assessment that focuses on governance issues. During the MAP process, the governing authority completes a self-study, and then a peer reviewer with trustee experience makes a site visit. The peer reviewer writes a report with constructive criticisms so the museum can better meet best practices. While this MAP assessment does not focus exclusively on board diversification, peer reviewers will undoubtedly discuss this best practice.

Using knowledge gained from this self-evaluation process, whether from a matrix, MAP, or some other method, governing bodies can effectively recruit new members. A special consideration during this process is the importance of fundraising capabilities to the governing authority. Although board members who represent underserved populations bring important community perspectives to the board, they may be unable to provide extensive contacts to use during fundraising. However, these board members might bring a persuasive

passion about the museum and its mission to their service, which is helpful when fundraising. When vetting new members, the board must determine, based in part on upcoming museum plans (for example, whether a capital campaign is starting soon) the importance of the additional financial contacts to the museum.

Although many facts, figures, and recommendations are available to museums regarding board diversification, there are not many examples available of *how* specific museum boards approached this issue. While museum professionals almost uniformly acknowledge the need to better listen, reflect, and react to the needs of local communities, I remain unsure as to how many museums are responding to these issues and implementing change. Are museums changing as a result of new, different ways of interacting with their communities? In an attempt to find answers about how boards decide to seek diversity, I created a survey about governing authorities and the diversification process. I asked two museums to complete the survey based on their demonstrated commitment to their communities: the Strong Museum in Rochester, New York and the San Diego Natural History Museum in San Diego, California.

I used several criteria to determine on which museums to focus my research. One, the board of directors must be able to nominate and select new members, as opposed to having them appointed by a mayor, or a vice-president in an university setting. Two, the museums needed to have a long-term interest in diversity issues – at least five years, and preferably ten years. Three, the museums should state commitments to diverse communities in mission statements, and ideally, that commitment should be older than three years. Four, the governing authority worked with diversity issues for more than two years. Fifth, and most importantly, the trustees or museum directors who had participated in the

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<sup>29</sup> Rutledge 14-19.

diversification process needed to be willing to speak to me about the procedures at their museums. Pamela Bruder, Trustee Emeritus at the San Diego Natural History Museum, and G. Rollie Adams, President and CEO at the Strong Museum, agreed to answer my questions about their boards' operations. Both the Strong Museum and the San Diego Natural History Museum maintain a history of meeting their communities' needs through programming, and each worked on diversity issues for at least ten years.

### San Diego Natural History Museum

Local, amateur naturalists established the San Diego Society of Natural History in 1874. The museum's present home, in Balboa Park, opened in 1933. Accredited by the American Association of Museums, the museum has a strong regional focus, as evidenced by the mission adopted in 1991 by the Society: "To interpret the natural world through research, education, and exhibits; to promote understanding of the evolution and diversity of Southern California and the peninsula of Baja California; and to inspire in all a respect for nature and the environment."<sup>30</sup> The museum recognizes the San Diego region's demographic diversity in its vision statement, which says in part that the Museum "will provide programs that are timely, user-friendly, and relevant to the real-life needs of the diverse populations of the San Diego-Baja California region today and tomorrow."<sup>31</sup> San Diego is a rapidly growing city — sixth largest in the nation. According to 1990 census figures, the population of San Diego County was 2,498,016. Whites constituted 67.2 percent of the population, Asians/Pacific Islanders 11.8 percent, African Americans 9.3 percent, and Native Americans 0.6 percent. Hispanics represented 20.1 percent of the

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<sup>30</sup> About the Museum, San Diego Natural History Museum, June 1, 2001, <[www.sdnhm.org/about/mission.html](http://www.sdnhm.org/about/mission.html)>

<sup>31</sup> About the Museum, San Diego Natural History Museum, June 1, 2001, <[www.sdnhm.org/about/mission.html](http://www.sdnhm.org/about/mission.html)>

population.<sup>32</sup> By 1998, the county's population increased to an estimated 2,794,785. Whites comprised 60.8 percent of the population, Asians/Pacific Islanders 9.2 percent, and African Americans 6.0 percent. Hispanics represented 24 percent of the population.<sup>33</sup> In addition to the diverse county population, San Diego is near the Mexican border, which enables the Museum to make collecting trips into Mexico. San Diego is economically diverse, and key industries include defense, agriculture, high technology, international trade, manufacturing, biotechnology, retail, and tourism.<sup>34</sup> Because the community has so many different voices to hear, and because the Society included diversity issues in the 1991 strategic plan, board diversity is an important topic for this museum.

### Strong Museum

Unlike the San Diego Natural History Museum, a single collector, Margaret Woodbury Strong, established the Strong Museum in Rochester, New York. She collected the products of middle class life, primarily created between 1820 and 1940, and she left the bulk of her fortune in a trust to fund her museum. In 1989, the museum broadened its focus to include items produced after 1940. The museum's current mission statement, adopted in September 1998, says that the Museum "explores and interprets everyday life in the United States after 1820 in order to help people better understand themselves and each other, individually and collectively. The museum accomplishes this through [...] activities that engage, entertain, and enlighten the people of its diverse community [...]."<sup>35</sup> The Strong Museum is extremely concerned with their community's needs and regularly conducts market research. According to demographic research conducted by the Museum in 1994,

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<sup>32</sup> "San Diego," Microsoft Encarta Encyclopedia, CD-ROM, Microsoft, 2000.

<sup>33</sup> About San Diego: Fast Facts, San Diego Chamber of Commerce, June 1, 2001, <[www.sdchamber.org](http://www.sdchamber.org)>.

<sup>34</sup> About San Diego: Fast Facts, San Diego Chamber of Commerce, June 1, 2001, <[www.sdchamber.org](http://www.sdchamber.org)>.

<sup>35</sup> 1998 IMLS General Operating Support grant application, Strong Museum, January 15, 1998, i.

the greater Rochester area is 82 percent white, 10 percent African-American, 3 percent Hispanic, and 1 percent Native American. The greater Rochester area represents a population of 1,088,000 in Monroe County (home to Rochester) and the five surrounding counties.<sup>36</sup> According to the 1990 census, the city of Rochester is more diverse, with a population that is 61.3 percent white, 31.6 percent African-American, 1.6 percent Asian and Pacific Islander, and 0.5 percent Native American. Hispanics, represent 8.2 percent of Rochester's citizens. These figures are based on a 1990 population of 231,636.<sup>37</sup>

At the Strong Museum, President and CEO G. Rollie Adams completed my survey describing board practices. At the San Diego Natural History Museum, Trustee Emeritus Pamela Bruder completed the form. While the two boards are of a similar size, there are differences in operations. At the Strong Museum, the board has 25 members, has a committee structure in place, and meets eight times annually. The Museum does not use term limits. There is a strong collaboration between the senior staff and the board, especially in the strategic planning process. The Strong Museum, which first began long-range planning in 1988, has three-year strategic plans that they revisit and revise annually. During the Museum's most recent strategic planning in 1998, a committee of eight trustees worked with the staff's seven member Senior Leadership Team to create a plan later approved by the entire board. The Strong Museum did not seek community input during this planning process, perhaps because the Strong actively researches its community, conducting marketing surveys in 1992, 1994, and 1998. However, included in the plan's evaluation criteria are diversification of the Strong Museum's staff, board, and audience.<sup>38</sup>

At the San Diego Natural History Museum, the board can reach up to 35 members, although

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<sup>36</sup> 1998 IMLS General Operating Support grant application, Strong Museum, January 15, 1998, 1-2.

<sup>37</sup> "Rochester (New York)," Microsoft Encarta Encyclopedia, CD-ROM, Microsoft, 2000.

at the time Pamela Bruder completed the survey, the board size was 31 members. The board meets monthly. The board does use term limits, limiting members to two consecutive three-year terms. After reaching the maximum term, the board member must take one year off from the board before standing for reelection. The Museum's board also conducts strategic planning, but on a longer-range scale of ten years. A ten-year plan created in 1991 included selected members of the board, a consultant, the executive director, staff, community members, and representatives from museum volunteers in the planning process. The Museum's plan also includes evaluation criteria based upon diversity.<sup>39</sup>

Both the San Diego Natural History Museum and the Strong Museum serve diverse audiences, and their missions drive service to their diverse communities. The two institutions approach board diversity much the same way. The San Diego Natural History Museum actively uses matrixes to track the skills and characteristics the board lacks, and then recruits appropriate board representatives from their diverse community. For example, the board did not have a representative from the local Kumeyaay tribe, despite their presence within the community. As a result, the board visited the tribal council, asked for assistance finding an appropriate new trustee, and successfully recruited a new board member.<sup>40</sup> The Strong Museum operates in a similar fashion. The board's governance committee identifies suitable candidates, invites them to the museum to become acquainted with other board members, and depending upon availability and mutual interest, the perspective candidate is asked to serve. While neither museum has formalized the consideration of board diversity within their by-laws concerning election to the governing authority, each museum claims a

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<sup>38</sup> Rollie Adams, governance survey to author, April 19, 2001.

<sup>39</sup> Pamela Bruder, governance survey to author, May 2, 2001.

<sup>40</sup> Pamela Bruder, "Building Boards that Reflect Our Communities: How Far Have We Come," AAM Annual Meeting, St. Louis Convention Center, St. Louis, May 8, 2001.

100 percent success rate recruiting appropriate board members over the past five years.<sup>41</sup> The boards do articulate their commitments to diversity as policy in their strategic plans, however.

I anticipated that both of these institutions would have their strong community ties reflected in the composition of their governing authorities. The Strong Museum follows a corporate model of business practice, and as mentioned above, regularly conducts market research and benchmarks the best practices within the museum field. Because the San Diego Natural History Museum makes collecting trips into Mexico, the board recruited Mexican citizens to join the governing authority. These board members also help to represent the Mexican community that spends part of their time in Mexico and part of their time in San Diego. Pamela Bruder reports, “Our board represents all major ethnic groups and all levels of economics; it represents the major educational and scientific communities.”<sup>42</sup> I expected that both museums would need to prepare their board members to effectively work together, to perhaps offer training in diversity awareness. I did not think that this was an unrealistic expectation, since the board would be drawing people of different cultural, ethnic, and economic statuses together into one team. In her book *Building Board Diversity*, Jennifer Rutledge writes that one key pointer to retain any newly recruited board member is to “build relationships that foster trust and alliances, and to follow sound board development practices to create a positive working climate for all board members.”<sup>43</sup>

Rollie Adams notes that diversity is discussed in the Strong Museum’s board orientation manual, during board orientation sessions with trustees and staff, and as a board

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<sup>41</sup> Pamela Bruder, governance survey to author, May 2, 2001, and Rollie Adams, governance survey to author, April 19, 2001.

<sup>42</sup> Pamela Bruder, governance survey to author, May 2, 2001.

<sup>43</sup> Rutledge 29.

meeting topic. However, he comments that the staff has not “had to do anything special” to create a sense of teamwork among board members. “Everyone participates on an equal footing. The CEO’s job is to stay in touch with all trustees on a regular basis outside the regular structure of board and committee meetings. This informality and frequent contact makes teamwork easy.”<sup>44</sup>

Pamela Bruder does not think that any type of special diversity training is necessary. She comments that, “We do not train in ‘diversity,’ we use it and accept it. We never differentiate among any trustees: we all serve and work together. All orientation for everyone is the same, and diversity issues are not an issue. If you have to ‘train’ for diversity, you are *not* a truly diverse board” (emphasis original).<sup>45</sup> One possible reason that these museums do not need to specifically train new board members about diversity issues is the sophistication of their board members. The museums’ governing authorities are not selecting board members solely to fulfill a board diversity requirement. The community members the boards recruit have other skills that they bring to the boardroom, and perhaps one of those qualities is an ability to forge an effective team, regardless of background. Both the Strong Museum and the San Diego Natural History Museum have considered diversity issues for over ten years, so perhaps tolerance and an ability to work with others has become an ingrained part of the institutional cultures.

As I started this research project, another of my assumptions was that a museum whose board reflects the diversity of its community is better able to serve its community in a meaningful way. I thought that a museum whose board included the various segments of its community would, as a direct result of its board membership, be better able to offer

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<sup>44</sup> Rollie Adams, governance survey to author, April 19, 2001.

<sup>45</sup> Pamela Bruder, governance survey to author, May 2, 2001.

educational programs, exhibits, and initiatives that welcomed those segments of its community. To my surprise, both Pamela Bruder and G. Rollie Adams disagreed with me. Pamela Bruder reported that while the San Diego Natural History Museum reached new audiences after the board committed to diversify itself, the process did not cause the new audiences to attend. Instead, she says that “Diversity (diversifying the board) did not change our audience — we (the board) changed to better reflect the audience. The audience is the same — all encompassing the community.”<sup>46</sup> She later commented that in one area, having a board member from an audience segment was helpful as the museum targeted that segment: “We strengthened our education programs in Baja California [Mexico], but that effort was parallel to board diversity (obtaining members from Baja) and it did strengthen ties.”<sup>47</sup> Adams disagreed completely with my assumption, stating, “Reaching new audiences does not result from board diversification. Reaching new audiences results from having a mission and strategic plan developed jointly by board and staff and implementing it systematically.”<sup>48</sup> Since the Strong Museum began its strategic planning, it has successfully drawn new audience segments to the museum.

In Adams’ opinion, having a diverse board is not the reason that the Strong Museum better serves the various audiences in the Rochester community. He reports that, “Our museum’s diversity does not flow from the board itself being diverse. It flows from the mission and vision and strategic plan.”<sup>49</sup> The board’s influence is felt in that it helps to develop the strategic plan, along with the senior staff, and it approves the plan. The board’s diversity is not the key element guiding the Strong Museum toward inclusion; the key

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<sup>46</sup> Pamela Bruder, governance survey to author, May 2, 2001.

<sup>47</sup> Pamela Bruder, governance survey to author, May 2, 2001.

<sup>48</sup> Rollie Adams, governance survey to author, April 19, 2001.

<sup>49</sup> Rollie Adams, governance survey to author, April 19, 2001.

element is the diversity goals included in the strategic plan. As a result of implementation of the strategic plan, the Strong Museum has increased diversity of staff and volunteers, as well as programs. For example, the Museum offers a program called Summer SUN (Strong's Urban Neighborhoods). This program, developed in 1991, provides facilitated, multiple museum experiences to 1,850 urban children, who are mostly African-American and Hispanic, each summer. According to Adams' explanation of operations, the museum developed Summer SUN from the guidance of the strategic plan, not from contacts or recognition of an opportunity resulting from the board's knowledge. The Strong Museum has also collaborated with more than 85 community organizations, as a result of strategic, programmatic goals. While the strategic plan guides Adams' decisions as CEO, the board of directors, with their diversity and commitment to diversification, shaped the strategic plan. Whether the board or the strategic plan steers the Strong Museum to inclusiveness is perhaps dependent upon perspective.

At the San Diego Natural History Museum, Pamela Bruder reports that in the ten years since the board started to plan strategically and articulated a commitment to diversity in the strategic plan, staff and volunteers now better represent the community. Staff composition changed, in part because the museum made a commitment to hiring staff fluent in Spanish and English. She also reports that some museum operations have changed, including exhibitions, research, public programs, and school programs.<sup>50</sup> For example, the Museum designed a school program specifically for Baja city schools, an across the border partnership that shows both vision and leadership. The Museum successfully partnered with new community groups, and ultimately reached new audiences, increased attendance and membership, and improved interaction with its community as a result of the board

diversification. However, the board looks beyond the community ties of individual members to their effectiveness at being a part of the governing authority. Bruder states, “the museum’s commitment to diversity has been successful for us and the community. [However], [s]ome trustees chosen for ‘diversity’ have not had the commitment level we wanted. They are not retained after a term is finished.”<sup>51</sup>

Both the Strong Museum and the San Diego Natural History Museum have made great progress including the various audiences within their communities. The two institutions are succeeding in making their museums into community resources, and not places that exist solely to collect. Both museums have been working on diversity issues for over ten years, and are aware of *Excellence and Equity*. However, neither institution believes that the publication specifically influenced their operations. At the San Diego Natural History Museum, the board of trustees first started to talk about issues surrounding diversification and the community’s needs in 1983, long before the 1992 publication of *Excellence and Equity*. Pamela Bruder commented that while the publication was “probably” an influence on their planning process, she does not recall that it “was a primary resource.”<sup>52</sup> The Strong Museum hired Rollie Adams as President and CEO in 1987, and the museum started strategic planning within four months of his hire. Diversity issues concerned the Museum from that original planning process, although those concerns were not necessarily originating at the board level, or because of diversity at the board level. By 1992, the Strong Museum had worked on diversity issues for four years. They had just completed their first in-depth marketing survey of the Rochester community the year prior. Rollie Adams reports that the Strong Museum read the report, and “made sure that we

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<sup>50</sup> Pamela Bruder, governance survey to author, May 2, 2001.

<sup>51</sup> Pamela Bruder, governance survey to author, May 2, 2001.

conformed with its intent;” however, they had espoused the principles of *Excellence and Equity* before the American Association of Museums began to converse with the museum field about the public dimension of museums and their role as educational institutions.<sup>53</sup>

While studying these two museums, I attempted to discern similarities in their approach to diversity issues. Ultimately, I wondered if model approaches to board diversification existed within their governance practices. These two well-established museums have elements of best practice in their work. A basic component is knowledge of your community and its various elements, knowledge of your audience, and knowledge of your staff, volunteers, and board. Museums cannot address community needs unless the institution recognizes those needs. The Strong Museum surveyed its audiences three different times in a six-year period, allowing them to gain an in-depth knowledge of community perceptions and expectations of the institution. Obviously, not every museum can afford to do this type of research; however, grant funds are available to museums to start researching these issues at a more affordable cost. For example, the Institute of Museum and Library Services and the American Association of Museums jointly developed the Museum Assessment Program: Public Dimension Assessment to coincide with the release of *Excellence and Equity*. This MAP assessment serves as an important resource for museums that might not otherwise be able to afford to collect this type of data. The Public Dimension Assessment supports an evaluation of public programs and operations, and helps the museum review the public’s perception of, experience in, and involvement with the museum. This program can help museums address the needs of their audiences, even if they cannot afford to do research like that of the Strong Museum.

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<sup>52</sup> Pamela Bruder, governance survey to author, May 2, 2001.

<sup>53</sup> Rollie Adams, governance survey to author, April 19, 2001.

The San Diego Natural History Museum demonstrated how museums are able to use the in-depth knowledge that they have of their community to include the community on their governing boards. The Museum recognized that a particular Native American tribe, which had a strong presence in their community, did not have a voice on the Board of Trustees. To find a representative, the Board first looked to the spreadsheet of skills that they use to track the member qualities that the Board currently wants to add in their new members. Once the Board articulated the skills that it wanted its newest representative to have, the members of the nominating committee went to the tribe's council for help recruiting an appropriate member. The tribal council then assisted the Museum in locating a person possessing the desired qualities. In part because the Board specified the skills they wanted the new member to have, their work with the tribal council succeeded. The partnership between the tribal council and the Board of Trustees did not end with the recruitment of a new board member, however. The San Diego Museum of Natural History is now helping the tribe to develop a new museum. The Museum also wants the tribal council's assistance recruiting a second board representative from the tribe.<sup>54</sup> This relationship shows how a dialogue between museums and community groups can grow into a mutually beneficial partnership.

The final recurring element that I found in my talks with both the Strong Museum and the San Diego Museum of Natural History is the awareness that a museum does not automatically become more inclusive simply because the board has diverse representatives of the community. Rollie Adams firmly believed that the Strong Museum was successfully inclusive in attendance, staff, and board because the Museum included diversity goals in their strategic, long-range planning. Because the Strong Museum attached numbers and

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<sup>54</sup> Pamela Bruder, "Building Boards that Reflect Our Communities: How Far Have We Come," AAM Annual Meeting, St. Louis Convention Center, St. Louis, May 8, 2001.

percents to their goals, the Museum could measure their level of success. If not at an appropriate level, the Board of Trustees and the senior staff could adjust the plan of action so that the Museum could meet its goals. While a board member can facilitate access to a specific, targeted audience segment, the museum still must work to make that audience recognize their commitment to develop a relationship. The museum must create ties, develop programs that appeal and have meaning to the particular audience, and commit to changing operations to become a welcoming, inclusive place. This type of change does not stem solely from a diverse board of trustees.

When I first started to research the effect that *Excellence and Equity* had in the museum field, I expected to see inclusiveness that directly resulted from its publication. I supposed that *Excellence and Equity* was the original articulation of the importance of diversity issues to museums and of why museums needed to address these issues with the goal of becoming inclusive, educational institutions. Instead, I found that the work of inclusion was already occurring in the museum field, which probably spurred the American Association of Museums to start a nationwide conversation about the topic. Museums like the San Diego Natural History Museum and the Strong Museum started to address diversity issues long before the publication of *Excellence and Equity*. While its publication focused attention on this issue, and articulated ten principles that museums should consider for their operations, *Excellence and Equity* was not the first time that the museum field considered the issues of diversity, education, and inclusiveness. However, the museums that helped start a conversation about diversity issues through their work can serve as models for other museums that still want to implement the principles of *Excellence and Equity* on the level of the governing board.

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## Survey Questions and Considerations

### Institution Information

1. Institution's name
  
1. Attendance during previous calendar year
  
2. Number of full-time, paid staff
  
3. Non-Federal Operating income during previous fiscal year

*Please attach a copy of the most recent annual report*

### Governing Authority Information

1. Size of Board \_\_\_\_\_
2. Frequency of Board Meetings \_\_\_\_\_
3. Are term limits used?
  - Yes  
Length of term \_\_\_\_\_
  - No

### Formal Planning Documents

1. Mission Statement
  - a. When was it initially approved?
  
  - b. Who approved it?
  
  - c. Has your mission statement been revised in the last ten years?
    - Yes
    - No

*Please attach a copy of the mission statement*

2. Strategic/Long Range Plan
  - a. When was the strategic/long range plan last revised?
  
  - b. Who was involved in the strategic plan's creation? (check as many as apply)
    - Entire governing authority
    - Committee of the governing authority
    - Consultants
    - Executive Director
    - Staff
    - Community members
    - Other \_\_\_\_\_

- c. Did the publication *Excellence and Equity* influence the museum's planning?
  - Yes (if so, explain)
  
  - No
- d. Is one of the plan's evaluation criteria based on diversity?
  - Yes
  - No
- e. Comments:

Diversity and the Governing Authority

*Commitment*

- 1. When did the Board first realize a need to address diversity concerns?
- 2. Is the Board's commitment to diversity stated in writing?
  - Yes      Where \_\_\_\_\_      When \_\_\_\_\_
  - No

*Community*

- 1. Has the Museum studied the demographic characteristics of its community?
  - Yes
  - No
- 2. Please list three dominant elements within the community:
  - 1.
  - 2.
  - 3.
- 3. Does the museum target specific audiences within the community?
  - Yes
  - No
- 4. Are the demographics of the museum's governing authority similar to that of the community?
  - Yes
  - No

Comments:

*Board Recruitment and Orientation*

1. Does the Board define diversity to include: (check as many as apply)
  - Race
  - Age
  - Gender
  - Sexual orientation
  - Economic status
  - Education level
  - Geographic location
  - Professional expertise
  - Other \_\_\_\_\_
2. Are these diversity issues considered when vetting potential members?
  - Yes
  - No
3. Do the by-laws reflect these criteria?
  - Yes
  - No
4. What percent (%) success have you had in achieving the above criteria in the past five years when recruiting new Board members?  
\_\_\_\_\_ %  
*Please give one example of how the board recruited a new member*
5. How many board members represent the local community? \_\_\_\_\_
6. In what types of diversity training does the Board participate? (check as many as apply)
  - Orientation manual
  - Topic at board meeting
  - Workshops
  - Retreats
  - Other \_\_\_\_\_
7. How does the Board create a sense of teamwork among its diverse members?

*Results of Board Commitment to Diversity*

1. Has the museum reached new audiences since the Board diversified?
  - Yes
  - NoIf yes, how much time elapsed before new audiences began attending?
  - 1-6 months
  - 6-12 months
  - less than 1 ½ years
  - less than 2 years
  - less than 2 ½ years
  - less than 3 years
  - over 3 years

2. Has the Board's commitment to diversity affected the diversity of the staff and volunteers?  
 Yes  
 No  
If yes, does this diversity better reflect the museum's community?  
 Yes  
 No
3. Has the Board's commitment to diversity changed the following: (check as many as apply)  
 Exhibitions  
 Research  
 Publications  
 Collection and Preservation  
 Public Programs  
 School Programs  
Please give one example of an affected program
4. Has the museum initiated new partnerships with community organizations since the board committed to a diverse vision?  
 Yes  
 No
5. Has a representative from the Board or staff spoken at professional meetings about this topic?  
 Yes  
 No

*Evaluation of Board Commitment to Diversity*

2. Has the Board's commitment to diversity resulted in the organization's ability to:  
(check as many as apply)  
 Reach new audiences  
 Increase membership  
 Increase general attendance  
 Increase staff diversity  
 Improve public relations  
 Increase funding
3. What are some of the successes and failures that resulted from this commitment?

If you are willing to share your organization's planning documents, please attach them to this survey. Thank you.

### Afterward

When creating this survey, I tried to balance my questions between basic board operations and board operations as related to diversity, while remaining aware that busy professionals would complete the survey — if too lengthy, they might not respond. In some cases, I did not explore a particular area in sufficient depth. In other instances, I think I could have improved the phrasing of my questions to better “get at” the information I wanted to learn. As I created this survey, I was very aware that I was asking questions about extremely sensitive areas: the board of trustees, and diversity issues.

In hindsight, I wish I explored the survey section Formal Planning Documents in more depth. While I asked about the institution’s mission statement, its approval date, and if the Board had revised the statement in the previous ten years, I did not ask the nature of the revisions or their motivations. On a practical basis, I thought it improbable that the respondents would readily have this information, so I did not include those questions. However, as I compared the Strong Museum and the San Diego Museum of Natural History, I found myself wanting additional information on how their institutional attitudes toward diversity evolved. Both museums were aware of the issue of diversity before the publication of *Excellence and Equity*; unfortunately, I could not track how the mission statement or long range plan reflected that awareness. Since museums typically do not divulge planning documents to the general public, no other sources existed to obtain this information.

In a second situation, I think that the medium of the written survey was inadequate to provide the information I wanted. Specifically, I wanted to know details about how the museum’s governing board matched characteristics of the community, whether race, age, gender, economic status, sexual orientation, geographic location, or professional expertise.

Both Rollie Adams and Pamela Bruder noted that their governing authorities considered these characteristics when vetting potential members, and both noted that their institutions had 100% success rates achieving these criteria in the previous five years while recruiting new board members. However, I wanted proof that their museums' boards include these characteristics. I asked for an example of how this process worked at the board level, and Pamela Bruder wrote about how the board recruited a particular new member. Rollie Adams responded with a general example of how their vetting process works, and did not include any specific allusions to particular people. In contrast to these written responses, I attended a session at the American Association of Museums Annual Meeting in St. Louis where Pamela Bruder spoke. She greatly expanded on the process and the new community relationships that developed from recruiting new board members from targeted communities. I wanted these types of responses from a survey, which proved unrealistic.

Overall, this survey provided useful information. Because the survey document's topic was governance and diversity, I think my questions were somewhat curtailed by sensitivity and the written nature of the survey. Ideally, I would have interviewed the respondents, based on the written survey, over the telephone. Another possibility would have been to follow these written responses with telephone interviews. Regardless of the alterations I might make now, I think that the document was extremely useful overall for a snapshot of current board operations as related to diversity.