



***COMPETENCIES FOR
MUSEUM LEADERSHIP***

September 2007

OVERVIEW OF COMPETENCIES

What is a Competency Model?

The Alberta Museums Association’s Leadership Working Group defined competencies to include “skills, knowledge, self-concept, traits and motives.”¹ Competencies define jobs at the global level rather than the specific job tasks and responsibilities typically found in job descriptions.

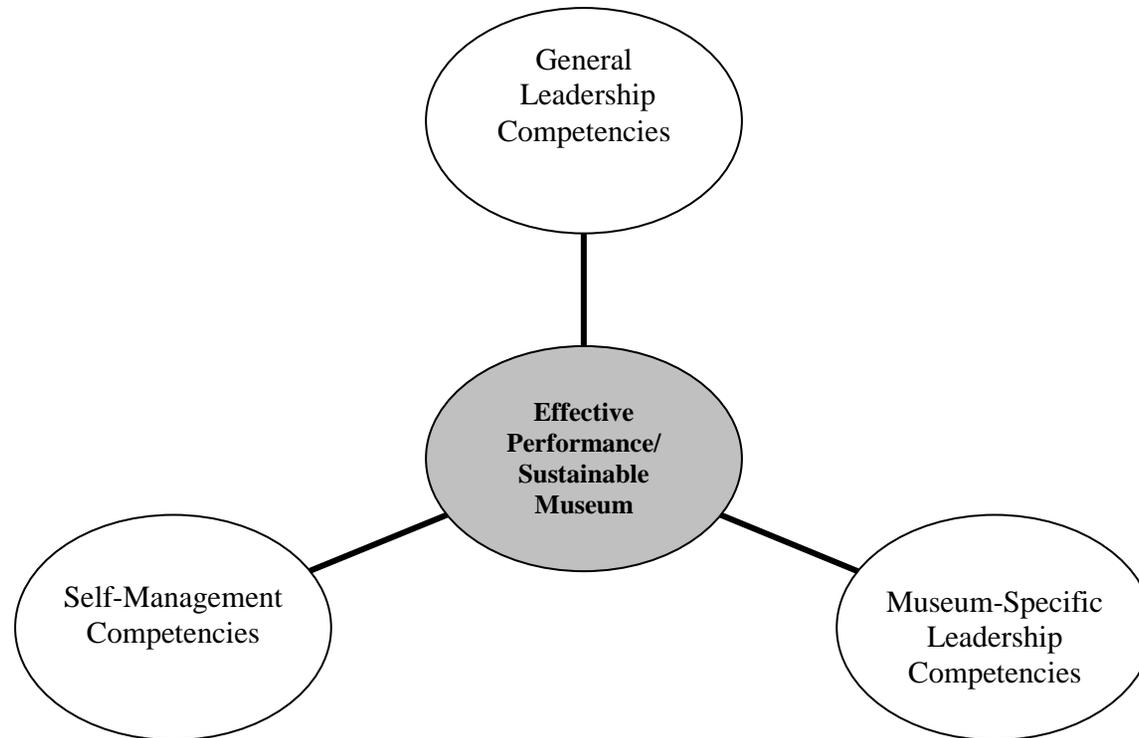
Three sets of competencies are fully presented in this document, including:

1. Self-Management Competencies	For all museum workers
2. General Leadership Competencies	For all museum workers
3. Museum-Specific Leadership Competencies	
▪ Executive Director Competencies	Executive Directors, General Managers
▪ Director/Curator Competencies	Director/Curator, Manager/Curator
▪ Discipline-Specific Museum Leadership Competencies	Curator, Collections Manager, Museum Educator, Interpreter, Conservator

¹ Alberta Museums Association, Leadership Working Group Final Report, 2007, page 15

Diagram 1 illustrates the interaction among the different sets of competencies – all competencies support creating a sustainable museum through the effective performance of its staff.

Diagram 1: Interaction amongst sets of competencies



Format of Competencies

Competencies are formatted using three components.

Column 1 identifies the *Competency* – this is a broad statement written to focus on results and use. For example:

Articulates museum's vision, mission, values and ethics through programs, services and policies.

The competency is not knowledge of the museum's vision, mission, values, and ethics, but rather how the competency is used – by articulating the museum's vision and mission through programs, services and policies.

Column 2 identifies *Possible Indicators* that that the competency has been achieved. In this example, the indicator is:

Uses the museum's vision, mission, values and ethics to develop a comprehensive museum plan which is reflected in programs, services and policies.

Column 3 provides *Possible Sources of Evidence* that would demonstrate that the competency has been achieved. Suggested sources of evidence are the products of any organization. For example, any organization would have products such minutes of staff meetings, budgets, staff workplans, reporting documents, etc. which can provide the evidence of work that contributes to achieving the competency. In the above example, three sources of evidence are identified:

- *Written strategic plan,*
- *Written measurable outcomes for each program area and*
- *An annual/summary report on how museum policies have supported the museum's vision, mission, values and ethics.*

Link to AMA Professional Development Grants Program

STEP 1

Identify three competencies that your professional development opportunity supports including competency sections (e.g., Self-Management) and page numbers.

STEP 2

As per the Professional Development Grants Program Jury Scoring Sheet, address how the professional development opportunity supports the identified competencies. This may be demonstrated using the *Possible Indicators and Sources of Evidence* columns outlined in the competency model document and/or other possible indicators / evidence.

SELF-MANAGEMENT COMPETENCIES

To be successful as a leader, there are a variety of self-management competencies that are needed. Self-management refers to the methods, skills, and strategies by which individuals can effectively direct their own activities toward the achievement of objectives. Such competencies include:

Adaptability

Ability to work in ambiguous or changing situations and with diverse individuals or groups

Problem Solving

Identifying the underlying issues inherent in problems and proposing positive solutions

Initiative

Persevering and proactively dealing with situations and issues, seizing opportunities that arise

Team work

Working collaboratively with others to achieve museum goals

Interpersonal Communication

Listening to others, understanding complex documents and reports, and communicating needs and directions clearly

Process Management

Ability to analyze systems and structures and propose alternatives to improve processes

Change Management

Adapting and altering plans and/or processes to operate effectively in a potentially volatile operating environment

Organizational Awareness

Understanding and using the workings, structures, climate and culture of the museum to achieve results

As the competencies identified in this research provide both indicators and sources of evidence, self-management competencies can be examined through the products and/or results of leadership competencies and museum-specific competencies, such as the plans and processes inherent in the work accomplished by the leader and how the leader achieved those plans and processes.

GENERAL LEADERSHIP COMPETENCIES

The General Leadership Competencies have similar components to those of the Executive Director. However, the indicators (and consequently the focus) changes to reflect the work of managers; leadership of their department/program as well as its day-to-day management and supervision tasks. For example, under Human Resource Management, the Executive Director competency is to **establish** a policy framework for the effective use of human resources in the museum – the general leadership competency is to **apply** policies which have been established by the Executive Director.

1. *Strategic Management*

The planning and monitoring function that ensures programs and services reflect the museum’s mandate and vision.

Competency	Possible Indicators	Possible Source of Evidence
1. Articulates museum’s vision, mission, values and ethics through programs, services and policies.	Uses museum’s vision, mission, values and ethics to develop a plan for the department/program reflected in programs, services and polices.	<p>Written measurable department/program objectives that support the museum’s vision, mission, values and ethics.</p> <p>All department / program staff have workplans which reflect the needs of the departments/ programs and the strategic plan of the museum.</p> <p>Annual/summary report on how the department / program has implemented the museum’s policies to support museum’s vision, mission, values and ethics.</p>
2. Explores initiatives that impact on the museum’s future viability and capacity.	<p>Uses information from the museum’s environmental scans to identify emerging issues that the department/ program could address.</p> <p>Establishes systems to identify</p>	<p>Staff minutes that reflect that department / program staff have discussed the results/impact of scans, how the department/program can address the results, and what will be the priorities.</p> <p>Department/Program budgets and/or workplans</p>

Competency	Possible Indicators	Possible Source of Evidence
	<p>department/program priorities and balance new directions with existing programs and services.</p> <p>Supports museum staff to initiate innovative programs and services.</p>	<p>reflect resources committed to innovative directions.</p> <p>Summary report on the networks and contacts of department/program staff that are used to initiate innovative programs and services.</p>
<p>3. Determines or adjusts department/program strategies, directions, priorities, structures and processes to changing needs of the museum.</p>	<p>Develops department/program long-term plan with outcomes (results) identified.</p>	<p>Summary report on changes to programs which address issues identified from scans or verification that existing programs address changes in the museum’s operating environment.</p>
<p>4. Anticipates issues and challenges to effectively position the department/program so that critical long-term issues addressed.</p>	<p>Brokers transparent relationships between the department/program and its public/museum’s communities that further the achievement of the department/program goals and the museum’s strategic plan.</p>	<p>Summary report on community/government contacts and scans; actions/results emerging from contacts. Results could include participation by societal sectors in developing programs/services, increases in attendance by the sector, specific funding for programs.</p>
<p>5. Ensures that programs are monitored to track progress and results, resources are optimally utilized, and revisions are made as needed.</p>	<p>Develops and implements overall framework to monitoring department / program’s activities.</p>	<p>Percentage of department/program budget/staff time committed to evaluating program results.</p> <p>Summary report on results from evaluations of department/program’s activities and revisions/implemented changes proposed resulting from monitoring.</p> <p>Summary report identifying best practices emerging from program reviews and how best</p>

		practices can be transferred to other department / programs.
6. Identifies problems that impact on department/program's operation as well as optimal solutions that reflect the museum's mission, values and ethics.	Involves others (internal and external to department /program/museum) in identifying solutions to solve problems; when required uses authority to resolve problems.	Summary report of scope of problems and solutions identified and implemented.
7. Uses communication strategies to effectively engage and inform stakeholders of department/program's directions (primarily internal focus).	Determines and communicates objectives, priorities and strategies that provide direction for: <ul style="list-style-type: none"> • Department/program staff/volunteers • Stakeholders. 	Minutes from department/program staff meetings that discuss communication strategies and generate options. Status report on department/program's contribution to the museum's communication strategy.

2. *Financial Management*

Monitoring and controlling of revenue and expenditures to achieve the museum's mandate and vision.

Competency	Possible Indicators	Possible Source of Evidence
1. Provides direction, monitoring and feedback on the financial health of the department/program.	Follows control mechanisms to ensure department/program budget reflects the museum's priorities and balances funding new directions with existing programs.	Quarterly report on how revenues and expenditures achieve department/program's priorities. Percentage of annual department/program budget committed to developing new directions. Annual/summary report documenting benefits received from programs by target audiences, with discussion on

		the financial cost of achieving the benefits.
2. Builds sustainability for the department/program by ensuring staff, volunteer and stakeholder awareness of the financial impact of long-term plans.	Plans and implements department/program's fund development initiatives in conjunction with the museum's fund development strategy.	Plan outlining how department/program resources will be used to acquire funds and the anticipated/actual results from fund development activities. Annual report discussing progress of plan.
3. Uses policies to efficiently use financial resources available to the department/program.	Creates and implements risk management plan for department/program.	Annual/summary report discussing department/program's implementation and monitoring of: <ul style="list-style-type: none"> • policies, • risk management plan, • compliance with legislation – health & safety, labour standards, health inspections, etc.), and/or • collective agreements.

3. *Human Resource / Volunteer Management*

The functions support the museum's human resources to implement the strategic and financial direction of the museum.

Competency	Possible Indicators	Possible Source of Evidence
1. Applies policies so that the human resources of the department/program are effectively used.	Implements human resource policies.	Annual/summary report that identifies how policies were implemented and rationale for any variations to HR policies.
2. Develops and implements a staffing plan for the department/program to ensure that current and future staffing needs for museum directions are achieved.	Develops and implements department /program's staffing plan to align with the museum's staffing plan.	Summary report on review of job descriptions to ensure they are current and reflect the work of the department/program and any revisions to job descriptions to address new directions and/or new positions.

Competency	Possible Indicators	Possible Source of Evidence
		<p>Projection of future work requirements and financial impact.</p> <p>Annual report on the number of positions filled by internal recruitment (can extend to number of internal applicants which applied for open positions and analysis of reasons for not being successful, such as lack of experience/training).</p>
<p>3. Creates and maintains a healthy workplace.</p>	<p>Sets annual performance standards and expectations for department/program staff which reflects the priorities of the museum’s strategic direction.</p> <p>Staff performance is monitored and performance issues are addressed.</p> <p>Creates opportunities for department/program staff to work together to further department/program and museum objectives.</p> <p>Changes culture and methods of operating that are counterproductive to the department/program’s success.</p> <p>Implements risk management plan.</p> <p>Where required, works with the union</p>	<p>Summary report of issues affecting the museum’s strategic direction emerging from staff performance reviews.</p> <p>Summary report on any disciplinary actions.</p> <p>Summary report on opportunities created and how such opportunities provided benefits for the department /program and museum.</p> <p>Summary report on how systems/processes were changed to support department/program goals and results of changes.</p> <p>Annual report discussing department/program’s implementation and monitoring of policies and risk management plan (such as compliance with legislation – health & safety, labour standards, etc.) and/or terms of collective agreement.</p>

Competency	Possible Indicators	Possible Source of Evidence
	to ensure productive relationship.	Annual report on number of grievances and contact with union on changes to collective agreement.
4. Fosters a culture of continuous learning which focuses on current and future needs of the museum.	<p>Invests in developing staff and volunteers.</p> <p>Institutes department/program-wide mechanisms and processes to promote continuous learning.</p> <p>Institutes succession planning strategies.</p>	Annual report on development opportunities undertaken and impact on museum's goals and succession plan.
5. Coaches department/program staff by providing direction, guidance and support to implement programs and services in support of the museum's mission and values.	<p>Sets expectations for performance.</p> <p>Assigns developmental opportunities to meet future department/program and museum needs.</p>	Annual report on direction, guidance and support provided to department/program staff.
6. Manages contracts with fee for service consultants.	Applies financial controls in developing and managing contracts for consultants.	

MUSEUM-SPECIFIC LEADERSHIP COMPETENCIES

EXECUTIVE DIRECTOR COMPETENCIES

The Executive Director is the senior staff position in the museum and reports directly to the governing authority of the museum. The position may have other titles including:

- **Chief Executive Officer**
- **General Manager**

As the senior position in the museum, the Executive Director’s work focuses on:

- Providing support and, at times, leadership to the museum’s governing authority,
- Managing and directing the museum’s operations including staff and volunteers,
- Ensuring the museum’s financial resources are secured and managed to achieve the museum’s mandate,
- Communicating the museum’s goals and directions to the public and stakeholders.

There is debate concerning the experience and/or training in museum work required by an Executive Director. While familiarity with the museum field, its systems, funding, and contacts is important, the primary focus of the senior staff person in any non-profit organization is to create systems and processes that ensure the organization is sustainable and to build the organization’s future. Consequently, the competencies presented for the Executive Director focus on leading the museum rather than specific content related to museum disciplines.

1. Strategic Management

The planning and monitoring function that ensures programs and services reflect the museum’s mandate and vision.

Competency	Possible Indicators	Possible Source of Evidence
1. Articulates the museum’s vision, mission, values and ethics through programs, services and policies.	Uses the museum’s vision, mission, values and ethics to develop a comprehensive strategic plan reflected in programs, services and policies.	The museum has a written strategic plan with short and long-term goals that support the museum’s vision, mission, values and ethics. All program areas have written measurable

Competency	Possible Indicators	Possible Source of Evidence
		<p>outcomes that support the museum’s strategic plan.</p> <p>Annual/summary report on how the strategic plan supported museum’s vision, mission, values and ethics.</p>
<p>2. Explores initiatives that impact on the museum’s future viability and capacity.</p>	<p>Conducts formal/informal environmental scans across a diverse range of stakeholders to identify emerging issues</p> <p>Establishes systems to identify priorities; balances new directions with existing programs and services.</p> <p>Supports museum staff to initiate innovative programs and services.</p>	<p>Board/staff minutes reflect that Executive Director presented results/impacts of scans on museum directions/plans.</p> <p>Budgets and/or staff workplans reflect resources committed to innovative directions.</p>
<p>3. Determines or adjusts long-term strategies, directions, priorities, structures and processes to changing needs of the museum’s operating environment.</p>	<p>Develops long-term plan with outcomes (results) identified.</p>	<p>Summary report on changes to programs which address issues identified from scans or verification that existing programs address changes in the community and rationale.</p>
<p>4. Uses political, cultural and social contexts to position the museum, or to address long-term issues, critical to the museum’s success.</p>	<p>Engages senior officials of local, provincial and federal governments to promote areas of mutual, long-term interest.</p> <p>Conducts formal and informal environmental scans across a diverse range</p>	<p>Summary report on community/government contacts and scans; actions/results emerging from contacts. Results could include participation by community groups in developing programs/services, increases in attendance by the sector, etc.</p>

Competency	Possible Indicators	Possible Source of Evidence
	<p>of the museum’s communities to identify emerging issues that could impact the museum’s future operations and directions.</p> <p>Brokers transparent relationships between the museum and its communities that further the achievement of museum goals.</p>	
<p>5. Ensures that museum programs are monitored to track progress and results, resources are optimally utilized, and revisions are made as needed so that programs remain relevant.</p>	<p>Establishes the most appropriate mechanisms to monitor and evaluate the museum’s programs/services (on-going, periodic, qualitative, quantitative, etc.).</p>	<p>Percentage of budget/staff time is committed to evaluating program results.</p> <p>Summary report on results from program/service evaluations.</p>
<p>6. Resolves complex problems which are difficult to define, often contradictory and are acting as barriers to achieving the museum’s strategic direction.</p>	<p>Develops mechanisms to collect and use information for problem solving.</p> <p>Establishes and uses cross-functional teams to solve complex problems.</p>	<p>Status report on type/sources of information collected to inform problem solving decisions.</p> <p>Summary report of teams established as well as how the work accomplished by each team contributed to resolving the problems.</p>
<p>7. Uses communication strategies to effectively engage, advocate, and inform the public and other stakeholders, including staff and volunteers, of museum directions.</p>	<p>Communicates objectives, priorities and strategies that provide direction for:</p> <ul style="list-style-type: none"> • museum staff/volunteers, • stakeholders and • the public. <p>Determines advocacy directions/messages</p>	<p>Written communication strategy plan that identifies key messages and addresses different target audiences for those messages.</p> <p>Minutes from staff meetings that discuss communication strategies.</p> <p>Written advocacy strategy with implementation</p>

Competency	Possible Indicators	Possible Source of Evidence
	and strategies by using information collected from various sources.	plan; report on progress.

2. *Financial Management*

Monitoring and controlling of revenue and expenditures to achieve the museum's mandate and vision.

Competency	Possible Indicators	Possible Source of Evidence
1. Provides direction, monitoring and feedback on the financial health of the museum.	Establishes control and follow-up mechanisms to ensure expenditures reflect museum's strategic priorities and that balances funding new directions with existing programs.	<p>Quarterly Variance Report on how revenues and expenditures achieve museum's strategic priorities.</p> <p>Percentage of annual budget committed to developing new directions.</p> <p>Annual/summary report documenting benefits received by target audiences, with discussion on the financial cost of achieving the benefits.</p>
2. Builds sustainability for the museum by ensuring public and stakeholder awareness of the financial impact of long-term plans.	Plans and implements fund development strategy from public and private sources.	<p>Fund Development Plan outlining how museum resources will be used to acquire funds and the anticipated/actual results from fund development activities.</p> <p>Annual/summary report discussing progress of plan.</p>
3. Creates policies for efficient use of the museum's financial resources.	Creates and implements financial management and investments policies.	Annual/summary report discussing implementation and monitoring of financial management and investment policies.

3. *Human Resource Management*

The functions support the museum's human resources to implement the strategic and financial direction of the museum.

Competency	Possible Indicators	Possible Source of Evidence
<p>1. Establishes a policy framework for the effective use of human resources (staff and volunteers) in the operation of the museum.</p>	<p>Establishes human resource (HR) policies.</p>	<p>Human Resource Policy for the museum that, among other sections, includes employment equity, harassment, vacation/holidays/leave, health and safety, training/education, grievances, and disciplinary action/termination.</p> <p>Annual/summary report that identifies how HR policies were implemented, rationale for any variations to HR policies, and policy impact on achieving the museum's strategic directions.</p>
<p>2. Oversees development and implementation of staffing plan to ensure that current and future staffing needs for museum directions are met.</p>	<p>Develops a comprehensive museum staffing plan that reflects the museum vision, mission, values and priorities.</p> <p>Establishes a competitive and relevant compensation and benefit plan.</p> <p>Develops and implements a succession plan that identifies key positions in the museum and strategies to recruit and retain.</p>	<p>Staff demographics/equity profile and impact on future staffing (such as retirement, recruitment from specific target audiences) and new directions of the museum.</p> <p>HR metrics - rates of staff turnover/ absenteeism/sick leave/accumulated overtime.</p> <p>Periodic report (probably every 3 to 5 years) on sector/geographic study of compensation/benefits packages.</p> <p>Number of positions filled by internal recruitment (can extend to number of internal applicants which applied for open positions and analysis of reasons</p>

Competency	Possible Indicators	Possible Source of Evidence
		for not being successful, such as lack of experience/training).
3. Creates and maintains a healthy workplace.	<p>Sets annual performance standards, expectations and review processes for staff with supervisory responsibilities which reflect the priorities of the museum’s strategic plan.</p> <p>Creates opportunities for groups to work together and get to know each other to further museum objectives.</p> <p>Changes culture and methods of operating that are counterproductive to the museum’s success.</p> <p>Creates and implements risk management plan.</p> <p>Negotiates and oversees productive management/union relationships.</p>	<p>Summary report on status of performance reviews and impact on museum directions, staffing, and learning/development activities.</p> <p>Summary report on team building opportunities created and how such opportunities provided benefits for staff to contribute to museum directions.</p> <p>Summary report on how changes in operating systems were addressed to support museum directions.</p> <p>Annual/summary report discussing implementation and monitoring of HR policies and risk management plan (such as compliance with legislation –health & safety, labour standards, etc) and/or terms of collective agreement.</p> <p>Annual/summary report on number of grievances and contact with union on changes to collective agreement.</p>
4. Fosters a culture of continuous learning which focuses on both current and future needs of the museum.	Sets expectations about investments in developing staff and volunteers.	Museum has a professional development policy for staff and volunteers.

Competency	Possible Indicators	Possible Source of Evidence
	<p>Institutes museum-wide mechanisms and processes to promote continuous learning.</p> <p>Institutes succession planning strategies.</p>	<p>Percent of budget committed to learning and professional development activities.</p> <p>Distribution of development funds for learning activities to staff throughout the museum.</p> <p>All staff have a personal development plan, which reflects both their current position responsibilities as well as opportunities for development; linked to performance reviews.</p> <p>Number of staff-led presentations/sharing information/best practices, published reports/articles etc.</p> <p>Number and type of work experiences and activities assumed by staff which involved work beyond customary role or areas of expertise (internal and external opportunities), including plans to transfer experiences.</p> <p>Annual/summary report on impact of development plans on improved performance and contribution to museum's directions.</p>
<p>5. Coaches by providing direction, guidance and support to implement programs and services which support the museum's vision, mission and values.</p>	<p>Sets expectations for performance.</p> <p>Assigns developmental opportunities to meet future museum needs.</p>	<p>Summary report on development opportunities undertaken and impact on museum's goals and succession plan.</p>

Competency	Possible Indicators	Possible Source of Evidence
6. Provides support, guidance and direction to the museum's governing authority (such as Board of Directors).	Provides Board members with information for making decisions on museum's directions.	Board minutes which document information Executive Director shares with the governing authority and decisions taken by the governing authority on the information.
	Acts as a resource to assist individuals in developing competence as members of a governing authority.	Implementation status of a board development plan .

DIRECTOR / CURATOR COMPETENCIES

The assumption with this combination of competencies is that the Director/Curator is the only management staff position with the museum; other staff in the museum may not have any supervisory responsibilities and have limited areas of specialization.

The competencies for this position would typically include the Executive Director competencies (for strategic management and financial management areas) as well as some minor revisions for the human resource management area. In addition, the discipline-specific leadership competencies from the curatorial position are included. Other discipline-specific leadership competencies are included; however, if other staff are working in the areas of education, collections and conservation, some of these tasks could be delegated.

1. *Strategic Management*

The planning and monitoring function which ensures programs and services reflect the museum's mandate and vision.

Competency	Possible Indicators	Possible Source of Evidence
1. Articulates museum's vision, mission, values and ethics through programs, services and policies.	Uses the museum's vision, mission, values and ethics to develop a comprehensive strategic plan reflected in programs, services and policies.	<p>The museum has a strategic plan with short and long-term goals that support the museum's vision, mission, values and ethics.</p> <p>All program areas have written measurable outcomes that support the museum's vision, mission, values and ethics.</p> <p>Annual/summary report on how the strategic plan supported museum's vision, mission, values and ethics.</p>
2. Explores initiatives that impact on the museum's future viability and capacity.	Conducts formal/informal environmental scans across a diverse range of stakeholders to identify emerging issues that the museum could address.	Board/staff minutes reflect that Executive Director/manager presents results/impacts of scans on museum directions/plans.

Competency	Possible Indicators	Possible Source of Evidence
	<p>Establishes systems to identify priorities; balance new directions with existing programs and services.</p> <p>Supports museum staff to initiate innovative programs and services.</p>	<p>Budgets and/or staff workplans reflect resources committed to innovative directions.</p>
<p>3. Determines or adjusts long-term strategies, directions, priorities, structures and processes to changing needs of the museum’s operating environment.</p>	<p>Develops long-term plan with concrete outcomes (results) identified.</p>	<p>Summary report on changes to programs which address issues identified from scans or verification that existing programs address changes in the community and rationale.</p>
<p>4. Uses political, cultural and social contexts to position the museum, or to address long-term issues, critical to the museum’s success.</p>	<p>Engages senior officials of local, provincial and federal governments to promote areas of mutual, long-term interest.</p> <p>Conducts formal and informal environmental scans across a diverse range of the museum’s communities to identify emerging issues that could impact the museum’s future operations and directions.</p> <p>Brokers transparent relationships between the museum and its communities that further the achievement of museum goals.</p>	<p>Summary report on community/government contacts and scans; actions/results emerging from contacts. Results could include community participation in developing programs / services, increases in attendance by the sector.</p>

Competency	Possible Indicators	Possible Source of Evidence
5. Ensures that museum programs are monitored to track progress and results; resources are optimally utilized; and revisions are made as needed so that programs remain relevant to its communities.	Establishes decision making mechanism to identify which museum priorities will be monitored and evaluated (on-going, periodic, etc.).	<p>Percentage of budget/staff time committed to evaluating program results.</p> <p>Summary report on results from program/service evaluations.</p>
6. Resolves complex problems which are difficult to define, often contradictory and are acting as barriers to achieving the museum's strategic direction.	<p>Develops mechanisms to collect and use information for problem solving.</p> <p>Establishes and uses cross-functional teams to solve complex problems.</p>	<p>Status report on type/sources of information collected to inform problem solving decisions.</p> <p>Summary report of teams established as well as how the work accomplished by each team contributed to resolving the problems.</p>
7. Uses communication strategies to effectively engage, advocate, and inform the public and other stakeholders, including staff and volunteers, of museum directions.	<p>Communicates objectives, priorities and strategies that provide direction for:</p> <ul style="list-style-type: none"> • museum managers, • stakeholders, and • the public. <p>Determines advocacy directions/messages and strategies by using information collected from various sources.</p>	<p>Minutes from staff meetings that discuss communication strategies.</p> <p>Written communication strategy which identifies key messages and addresses different target audiences for those messages.</p> <p>Written advocacy strategy with implementation plan; report on progress.</p>

2. *Financial Management*

Monitoring and controlling of revenue and expenditures to achieve the museum's mandate and vision.

Competency	Possible Indicators	Possible Source of Evidence
1. Provides direction, monitoring and feedback on the financial health of the museum.	Establishes and implements control and follow-up mechanisms to ensure expenditures reflect museum's priorities and which balances funding new directions with existing programs.	<p>Quarterly report on how revenues and expenditures achieve museum's priorities.</p> <p>Percentage of annual budget committed to developing new directions.</p> <p>Annual/summary report documenting benefits received from programs by target audiences, with discussion on the financial cost of achieving the benefits.</p>
2. Builds sustainability for the museum by ensuring public and stakeholder awareness of the financial impact of long-term plans.	Plans and implements fund development strategy from public and private sources.	<p>Plan outlining how museum resources will be used to acquire funds and the anticipated/actual results from fund development activities.</p> <p>Annual/summary report discussing progress of plan.</p>
3. Creates and uses policies for efficient allocation of the museum's financial resources.	Creates and implements financial management policies and risk management plan.	<p>Annual/summary report discussing implementation and monitoring of:</p> <ul style="list-style-type: none"> • policies, • risk management plan, • compliance with legislation – OH&S, labour standards, human rights, etc.); and/or, • collective agreements.

3. Human Resource Management

The functions support the museum's human resources to implement the strategic and financial direction of the museum.

Competency	Possible Indicators	Possible Source of Evidence
<p>1. Establishes a policy framework for the effective use of human resources (staff and volunteers) in the operation of the museum.</p>	<p>Establishes and implements human resource policies.</p>	<p>Annual/summary report that identifies how HR policies were implemented, rationale for any variations to HR policies, and policy impact on achieving the museum's strategic directions.</p>
<p>2. Oversees development and implementation of staffing plan to ensure the current and future staffing needs for museum directions are met.</p>	<p>Develops a comprehensive museum staffing plan that reflects the museum vision/values and priorities.</p> <p>Establishes a competitive and relevant compensation and benefit plan.</p> <p>Develops and implements a succession plan that identifies key positions in the museum and strategies to recruit and retain.</p>	<p>Staff demographics/equity profile and impact on future staffing (such as retirement, recruitment from specific target audiences) and new directions of the museum.</p> <p>HR metrics - rates of staff turnover/ absenteeism/sick leave/accumulated overtime.</p> <p>Periodic report (probably every 3 to 5 years) on sector/geographic study of compensation/benefits packages.</p> <p>Status on implementation of employment equity plan.</p> <p>Number of positions filled by internal recruitment (can extend to number of internal applicants which applied for open positions and analysis of reasons for not being successful, such as lack of experience/training).</p>

<p>3. Creates and maintains a healthy workplace.</p>	<p>Sets annual performance standards, expectations and monitors staff performance.</p> <p>Creates opportunities for groups to work together and get to know each other to further museum objectives.</p> <p>Changes culture and methods of operating that are counterproductive to the museum's success.</p> <p>Creates and implements risk management plan.</p> <p>Negotiates and oversees productive management/union relationships.</p>	<p>Summary report on status of performance reviews and impact on museum directions, staffing, and learning/development activities.</p> <p>Summary report on opportunities created and how such opportunities provided benefits for staff to contribute to museum directions.</p> <p>Summary report on how changes in operating systems were addressed to support museum directions.</p> <p>Annual/summary report discussing implementation and monitoring of policies and risk management plan (such as compliance with legislation – health & safety, labour standards, etc.) and/or terms of collective agreement.</p> <p>Annual/summary report on number of grievances and contact with union on changes to collective agreement.</p>
<p>4. Fosters a culture of continuous learning which focuses on both current and future needs of the museum.</p>	<p>Invest in developing staff /volunteers.</p> <p>Institutes museum-wide mechanisms and processes to promote continuous learning.</p> <p>Institutes succession planning strategies.</p>	<p>All staff have a development plan, which reflects their current position responsibilities, as well as opportunities for development; linked to performance reviews.</p> <p>Number of staff-led presentations/sharing information/best practices, published reports/articles etc.</p>

		<p>Number and type of work experiences and activities assumed by staff which involved work beyond customary role or areas of expertise (internally and external opportunities), including plans to transfer experiences.</p> <p>Annual/summary report on impact of development plans on improved performance and contribution to museum's directions.</p> <p>Percent of budget committed to learning and development activities, summary of the types of learning and development activities.</p> <p>Distribution of development funds for learning activities to staff throughout the museum.</p>
<p>5. Provides support, guidance and direction to the museum's governing authority (such as Board of Directors).</p>	<p>Provides Board members with information for making decisions on museum's direction.</p> <p>Acts as a resource to assist individuals in developing competence as members of a governing authority.</p>	<p>Board minutes which document information Executive Director shares with the governing authority and decisions taken by the governing authority on the information.</p> <p>Implementation status of a board development plan.</p>

4. Discipline Specific Competencies

Competency	Possible Indicators	Possible Source of Evidence
<p>1. Develops the acquisition plan to fulfill the museum's strategic direction.</p>	<p>In conjunction with other museum department/programs, evaluates the museum collection to determine weaknesses and strengths.</p>	<p>Collection plan document, with annual updates on progress, including how weaknesses in the museum's collection will be addressed.</p> <p>Annual budget established which facilitates the collections plan.</p>
<p>2. Develops policies for collections research which reflects the museum's strategic direction.</p>	<p>Creates/monitors policies that address research use of the museum's collection including research focus for education, interpretive and exhibition programs.</p>	<p>Research policy document and progress report on how the policy was used/rationale to any variation to policy use.</p>
<p>3. Develops scope and objectives of studies and research needed to enhance knowledge and use of the collection.</p>	<p>Identifies research priorities to achieve the museum's strategic directions.</p> <p>Integrates research priorities with exhibition development plan.</p> <p>Determines priorities and establishes a plan (with timeframe and resources) to implement the plan.</p>	<p>Research/exhibition document plan and progress report (such as number of research projects completed, published, etc.)</p> <p>Annual budget established which facilitates the research plan.</p> <p>Annual budget established which facilitates the exhibition development plan.</p>
<p>5. Develops policies for documentation, management and access to the museum's collection.</p>	<p>Creates/monitors policies that address access to the collections and standards for documentation.</p>	<p>Policy document and annual report on how the policy was used/rationale to any variation to policy use.</p>

Competency	Possible Indicators	Possible Source of Evidence
<p>6. Develops a comprehensive and systematic collections management plan.</p>	<p>Critiques and reviews exhibition, interpretive and education programming to identify and solve issues which impact on the management of the museum's collections, including information management systems.</p> <p>In conjunction with other department/program managers, seeks coordination and input in the museum-wide documentation and records management of the collection.</p>	<p>Plan and progress report on the implementation of the plan.</p> <p>Annual budget established which facilitates the collection management plan.</p>
<p>7. Develops a long-term plan to sustain the collection's information management system.</p>	<p>Analyzes the collection's information management system and recommends and implements changes/revisions/upgrades.</p> <p>Determines priorities and establishes a plan (with timeframe and resources) for implementation.</p>	<p>Report on changes to the policy/procedures.</p> <p>Annual budget established that reflects hardware/software requirements identified in plan.</p>
<p>8. Develops policies for delivering education programs including building collaborative relationships with K-12 stakeholders.</p>	<p>Creates/monitors policies that support development of collaborative relationships with the school systems.</p>	<p>Policy document and annual report on how the policy was used, rationale to any variation to policy use, and status of collaborative relationships.</p>
<p>9. Develop a comprehensive and systematic education plan.</p>	<p>Creates and implements plan that identifies education priorities to achieve the museum's strategic directions.</p>	<p>Plan and progress report on the implementation of the plan.</p>

	Determines priorities and establishes a plan (with timeframe and resources) to implement the plan.	Annual budget established which facilitates the education plan.
10. Develops policies for the long-term care of the collection.	Creates and monitors policies that address use of the museum's collection, long-term preservation (environmental monitoring and control, integrated pest management, collections storage, and treatments).	Policy document and annual report on how the policy was used, rationale to any variation to policy use, and status of collection's preservation activities.
11. Develops a comprehensive Care of Collections plan.	<p>In conjunction with other museum department / programs, evaluates the museum collection to determine priorities for care.</p> <p>Identifies long-term equipment/facility requirements to achieve the care to the collection plan.</p> <p>Determines priorities and establishes a plan (with timeframe and resources) to implement the plan.</p> <p>Develops and implements a disaster management plan.</p>	<p>Care of Collections plan and progress report on the implementation of the plan.</p> <p>Annual budget established which facilitates the care of collections plan.</p>
12. Develops policies for delivering programs to various public target audiences, including building	Creates/monitors policies that support development of collaborative relationships with community sectors.	Policy document and summary report on how the policy was used, rationale to any variation to policy use, and status of

collaborative relationships with community sectors.		collaborative relationships.
13. Develop a comprehensive and systematic public interpretation plan.	<p>In conjunction with other museum department/programs, evaluates the public interpretation program to determine priorities for development.</p> <p>Determines priorities and establishes a plan (with timeframe and resources) to implement the plan.</p>	<p>Public interpretation plan and progress report on the implementation of the plan.</p> <p>Annual budget established which facilitates implementation of the plan.</p>
<p>14. Acts as lead museum resource in the following areas:</p> <ul style="list-style-type: none"> • liaison with the K-12 education system, • relevant legislation and implementation on Occupational Health and Safety legislation, • relevant legislation regarding cultural property, • relevant legislation and strategies on risk management particularly as it relates to the museum's collection, • customer service initiatives. 	Provides information/advice to museum staff on procedures and impact to the museum on these areas.	<p>Number of informational presentations, articles, inquiries.</p> <p>For legislation, annual report on the level of compliance by the museum and actions required.</p>

DISCIPLINE-SPECIFIC MUSEUM LEADERSHIP COMPETENCIES

The discipline-specific leadership positions identified by the AMA Leadership Working Group include:

- **Curator**
- **Collections Manager**
- **Museum Education**
- **Interpreter**
- **Conservator**

These positions are essentially managers of specific areas, such as a department / program or unit, within a museum.

In defining the competencies of these positions, the following assumptions are made:

- The positions are responsible for the direction of a distinct unit or department / program within the museum.
- The positions will likely supervise other staff and volunteers who deliver the work of the unit. Therefore supervisory competencies are required.
- The degree of supervision required is unknown as it will depend on the number of staff supervised, the skills and capabilities of the staff supervised, and the work of the staff in the unit.

For each of the following positions, a set of discipline-specific leadership competencies is described. These competencies relate to the specific content of the museum discipline of the unit the position would manage. However, the competencies are in the context of the leadership role of the positions. For the purpose of this project it is assumed that, as managers, these positions may have a limited role in direct delivery of programs and services.

A second assumption is that an individual hired into a leadership position as a manager of a museum unit would have previously demonstrated some level of competency around the basics/fundamental skills of the discipline. For example, if an individual is hired at the Chief Curator level in an organization, it is assumed that they already have demonstrated expertise in museum-based research and the role of the collections in contributing to the museum's mission.

Consequently, the focus of the Discipline Competencies for Managers is on shifting their discipline-specific skills into their role as leader of a museum unit or department / program, not the competencies required to work in the discipline.

In any organization there is work that crosses department / programs or work units. Each manager's position has been assigned a specific area that affects all aspects of the museum's operations. Consequently each position assumes a lead role for the museum and acts as a resource to all staff and department / programs in the museum on the assigned area. This approach also supports succession planning strategies for museums, as individuals in leadership/management positions will gain experience in implementing museum-wide initiatives. The areas identified in the discipline-specific competencies are as follows:

Curator	Risk Management Strategies
Collections Manager	Cultural Property Legislation
Conservator	Occupational Health and Safety legislation
Education Manager	Liaison with the K-12 Education system
Interpreter	Customer Service Practices

However, individual museums may have assigned these areas to other positions in their museum.

DISCIPLINE-SPECIFIC MUSEUM LEADERSHIP COMPETENCIES

CURATOR

A Curator working in a leadership position (Chief Curator, Manager of Curatorial Services, Curator of Collections, etc.) will typically deal with developing and implementing long-range plans for the research and exhibition of the museum's collections.

Note: The focus of the Discipline Competencies for Managers is on **shifting** their discipline-specific skills into their role as leader of a museum unit or department / program, not the competencies required to work in the discipline.

Competency	Possible Indicators	Possible Source of Evidence
1. Develops the collections plan to fulfill the museum's strategic direction.	In conjunction with other museum departments/programs, evaluates the museum collection to determine weaknesses and strengths.	Collection plan document , with annual updates on progress, including how weaknesses in the museum's collection will be addressed. Annual budget established which facilitates the acquisition plan.
2. Develops policies for collections research which reflect the museum's strategic directions.	Creates/monitors policies that address research use of the museum's collection including research focus for education, interpretative and exhibition programs.	Research policies and progress report on how the policy was used/rationale to any variation to policy use.
3. Develops scope and objectives of studies and research needed to enhance knowledge and use of the collection.	Identifies research priorities to achieve the museum's strategic directions. Integrates research priorities with exhibition development plan.	Research/exhibition document plan and progress report (e.g., number of research projects completed) Annual budget established which facilitates the research plan.

Competency	Possible Indicators	Possible Source of Evidence
	Determines priorities and establishes a plan (with time frame and resources) to implement the plan.	Annual budget established which facilitates the exhibition development plan.
4. Acts as lead museum resource on relevant legislation and strategies on risk management particularly as it relates to the museum's collection.	Provides information/advice to museum staff on application and impact of risk management strategies.	Number of informational presentations, articles, reports to staff on impact of risk management on museum and department/program operations. Level of risk management plans by the museum.
5. Effective program management skills to achieve department/program goals.		<i>See General Leadership Competencies</i>

DISCIPLINE-SPECIFIC MUSEUM LEADERSHIP COMPETENCIES

COLLECTIONS MANAGER

A Collections Manager working in a leadership position (Manager of Collections, Registrar, etc.) would develop and oversee the collections documentation program of the museum.

NOTE: The focus of the Discipline Competencies for Managers is on **shifting** their discipline-specific skills into their role as leader of a museum unit or department / program, not the competencies required to work in the discipline.

Competency	Possible Indicators	Possible Source of Evidence
1. Develops policies for the documentation, management and access to the museum's collection.	Creates/monitors policies that address access to the collections and standards for documentation.	Policy document and annual report on how the policy was used/rationale to any variation to policy use.
2. Acts as lead museum resource on relevant legislation regarding cultural property.	Provides information/advice to museum staff on application and impact of relevant legislation on cultural property.	Number of informational presentations, articles, reports to staff on impact of cultural property legislation on museum and department/program operations. Annual report on the level of compliance by the museum and actions required.
3. Develop a comprehensive and systematic collections management plan.	Critiques and reviews exhibition, interpretive, and education programming to identify and solve issues impacting on the management of collections, including information management systems. In conjunction with other	Plan and progress report on the implementation of the plan. Annual budget established which facilitates the collections management plan.

Competency	Possible Indicators	Possible Source of Evidence
	department/program managers, seeks input in the museum-wide documentation and records management of the collection.	
4. Develops a long-term plan to sustain the collection's information management system.	Analyzes the collection's information management system and recommends and implements changes/revisions/upgrades.	<p>Report on changes to the policy/procedures.</p> <p>Annual budget established that reflects hardware/software requirements identified in plan.</p>
5. Effective program management skills to achieve department/program goals.		<i>See General Leadership Competencies</i>

DISCIPLINE-SPECIFIC MUSEUM LEADERSHIP COMPETENCIES

MUSEUM EDUCATION MANAGER

A Museum Education Manager working in a leadership position (such as Education Director, Curator of Education, Education Manager etc.), would develop and oversee the programs, events and activities which educate students in the K-12 system.

NOTE: The focus of the Discipline Competencies for Managers is on **shifting** their discipline-specific skills into their role as leader of a museum unit or department / program, not the competencies required to work in the discipline.

Competency	Possible Indicators	Possible Source of Evidence
1. Develops policies for delivering education programs including building collaborative relationships with K-12 stakeholders.	Creates/monitors policies that support development of collaborative relationships with the school systems.	Policy document and annual report on how the policy was used, rationale to any variation to policy use, and status of collaborative relationships.
2. Acts as lead museum resource and liaison with the K-12 education system.	Provides information/advice to museum staff on procedures for working with the K-12 system and changes to curriculum etc. which could affect museum programs/services.	Number of informational presentations, articles, inquiries, etc. on building relationships with the K-12 system.
3. Develop a comprehensive and systematic education plan.	Creates and implements plan that identifies education priorities to achieve the museum's strategic directions. Determines priorities and establishes a plan (with time frame and resources) to implement the plan.	Plan and progress report on the implementation of the plan. Annual budget established which facilitates the education plan.
4. Effective program management skills to achieve department/program goals.		<i>See General Leadership Competencies.</i>

DISCIPLINE-SPECIFIC MUSEUM LEADERSHIP COMPETENCIES

CONSERVATOR

A Conservator working in a leadership position would develop and oversee programs which focus on the long-term care of museum's collections.

NOTE: The focus of the Discipline Competencies for Managers is on **shifting** their discipline-specific skills into their role as leader of a museum unit or department / program, not the competencies required to work in the discipline.

Competency	Possible Indicators	Possible Source of Evidence
1. Develops policies for the long-term care of the collection.	Creates and monitors policies that address use of the museum's collection, long-term preservation (environmental monitoring and control, integrated pest management, collections storage, and treatments).	Policy document and annual report on how the policy was used, rationale to any variation to policy use, and status of collection's preservation activities.
2. Acts as the lead museum resource on relevant legislation and implementation of Occupational Health and Safety (OH&S) legislation.	Provides information/advice to museum staff on application and impact of Occupational Health and Safety legislation.	Number of informational presentations, articles, reports to staff on OH&S legislation impact on museum and department/program operations. Annual report on the level of compliance by the museum and actions required.
3. Develop a comprehensive care of collections plan.	In conjunction with other museum department/programs, evaluates the museum collection to determine priorities for care.	Care of Collections plan and progress report on the implementation of the plan.

Competency	Possible Indicators	Possible Source of Evidence
	<p>Identifies long-term equipment/facility requirements to achieve the degree of care outlined in the collections plan.</p> <p>Determines priorities and establishes a plan (with timeframe and resources) to implement the plan.</p> <p>Develops and implements a disaster management plan.</p>	<p>Annual budget established which facilitates the care of collections plan.</p>
<p>4. Effective program management skills to achieve department/program goals.</p>		<p><i>See General Leadership Competencies.</i></p>

Discipline-Specific Museum Leadership Competencies

INTERPRETER

An Interpreter working in a leadership position would develop and oversee programs which focus on programs and services for the public.

NOTE: The focus of the Discipline Competencies for Managers is on **shifting** their discipline-specific skills into their role as leader of a museum unit or department / program, not the competencies required to work in the discipline.

Competency	Possible Indicators	Possible Source of Evidence
1. Develops policies for delivering programs to various public target audiences, including building collaborative relationships with community sectors.	Creates/monitors policies that support development of collaborative relationships with community sectors.	Policy document and summary report on how the policy was used, rationale to any variation of policy use, and status of collaborative relationships.
2. Acts as lead museum resource for customer service initiatives.	Reviews customer service delivery systems and processes. Identifies and recommends approaches that meet customer needs as well as those of the museum. Provides information/advice to museum staff on customer service approaches.	Documented changes to museum-wide and/or specific department / program approaches to customer service based on review of systems. Number of informational presentations, articles, reports to staff on customer service approaches.
3. Develop a comprehensive and systematic public interpretation plan.	In conjunction with other museum departments / programs, evaluates the public interpretation program to	Public interpretation plan and progress report on the implementation of the plan.

	<p>determine priorities for development.</p> <p>Determines priorities and establishes a plan (with time frame and resources) to implement the plan.</p>	<p>Annual budget established which facilitates implementation of the plan.</p>
<p>4. Effective program management skills to achieve department / program goals.</p>	<p><i>See General Leadership Competencies.</i></p>	