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## EDUCATION COMMITTEES: STAGE-BY-STAGE

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My work in and with museums for about 25 years has provided me with ample opportunities to observe the roles and activities of many education committees from a variety of perspectives. As a founding board member of the new Madison Children's Museum, figuring out what the first Education Committee should be like was a complete mystery. Later, as staff liaison to Minnesota Children's Museum Education Committee for ten years, I was constantly challenged to find an appropriate match between the work the Committee wanted to do and what staff needed. Now in my practice of strategic and education planning with many museums, I continue to encounter education committees that require special handling. In fact, one of my colleagues advises boards (and not just museum boards) she works with to eliminate their education or program committees altogether.

Regardless how individual museums cast their mission and define their focus, education is at the heart of their value to their communities and central to their success in fulfilling their mission. This is an enormous task and one that clearly falls under the board's broad function. It is a task undoubtedly made easier with the expertise and perspective that an effective education committee can infuse into educational planning and evaluation. Too often, however, this resource and link to the full board not only do not support staff in their work, but actually slow down the work that does get done.

In 2003 I was asked to explore the role of education committees for Stepping Stones Museum for Children in Norwalk, CT. The Museum recognized that, after being opened for two years, the education committee that had been instrumental in getting the Museum open was not necessarily the same one needed for the next stage. The report proposed models for committees at different stages of organizational development and drew on interviews<sup>1</sup> I conducted and extensive experience in the field. Since then I have expanded the report to create a stage-based framework for education committees in order to make it useful across the field.

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<sup>1</sup> The Children's Museum, Boston; Children's Museum of Richmond; Lied Discovery Children's Museum; and Bay Area Discovery Museum.

## EDUCATION COMMITTEES AS THEY OFTEN ARE

Education is a museum's reason for existing and is essential to the definition of its legal status as a 501(c)3 educational, non-profit organization. A museum's educational focus is expressed in its vision, mission and core values and is primarily delivered through exhibits and programs.

This educational focus is typically what draws supporters to an organization as board members and as staff. A museum's educational work requires a personal commitment and invites a sustained passion. To be successful organizationally, a museum's educational work must have the support and understanding of the board, be relevant to the community and have buy-in from staff who implement the work.

Oversight for educational focus, practice and some type of planning is assigned to board-level education committees (also known as program committees or exhibit committees). In new children's museums, education committees are often the first to be formed, draw the highest interest as a committee assignment and wield the most power. In new as well as more seasoned museums, education committees seem to encounter more challenges and frustrations compared to other board committees.

Board committees seem to be clearer about how and when to involve board members and how to proceed in other areas such as nomination, finance, marketing and development. Perhaps existing conventions and standards from more established professions help guide those committees and provide clearer focus and roles.

The challenges and frustrations that education committees encounter emerge from a variety of factors. The same heightened sense of ownership in a museum's mission makes it ripe for personal visions and agendas. These committees are often given a broad charge to guide the museum's mission but without clear outcomes. It is also possible that these committees reflect the challenges that dog the current public educational debate about schools and children's learning.

It is common for committees to struggle to focus on the right work or to define work at the right level between implementation and policy. An education committee in one museum might approve exhibit topics, review content and design exhibits and in another it might review and endorse projects that require fiduciary risk. An on-going search to find the right balance between involving board members and/or volunteers is paralleled by on-going confusion about board and staff work in this area. In fact, sometimes as more skilled and specialized staff join the museum, challenges actually increase rather than decrease. An experienced staff's competence managing exhibits and programs and being out in the community may appear to eliminate the need for a committee. Finally, in some cases, museum leadership assumes that there "should" be an education committee. One is put in place although its purpose, role and work are not clear. But when an education committee works well, even if only briefly, it is a true asset to staff and the museum in accomplishing real work.

Not surprisingly, challenges increase with each transition a museum experiences, whether related to leadership, expansion or a change from a working board to a policy board. A relatively new field such as children’s museums is characterized by start-up organizations and rapid growth. New museums typically experience frequent transitions and repeatedly find themselves in new organizational territory. Each change requires new understandings about a museum’s educational work, new insights into serving the audience, new expectations for educational products and services, new resources for delivering exhibits and programs and, changes in board structure as well. This organizational learning, however, may not necessarily be reinvested in the organization to help build capacity.

Managing with varying degrees of success, individual museums have developed their own particular structures and roles for education committees that oversee their museum’s educational work. Currently, however, there is no real “best practice” in this area. In an effort to address this common challenge for many museums and bring a new resource to the field, I have developed a framework for the important area of board education committee oversight. The framework is a synthesis of recent thinking on organizational lifecycles, the practice of several children’s museums and broad experience in the field. It applies to small and large museums and museums at every lifecycle stage.

## LIFECYCLE STAGES

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Like humans, organizations grow up, move on and change with time and experience. Often new organizations are referred to as start-ups, just as some more established ones are considered mature. Management consultant Susan Kenny Stevens has identified seven stages in nonprofit organizational development and has developed a lifecycles approach<sup>2</sup> to understanding these organizations. The following matrix provides an overview for each stage.

STAGE	IDEA	START-UP	GROWTH	MATURE	DECLINE	TURN AROUND	TERMINAL
OVERVIEW	Community need sparks founding idea	Beginning operations: high passion, systems lag	Demand exceeds systems and capabilities.	Reputation for steady, relevant, vital services	Lose touch with audience; low funder confidence; declining attendance; weak financials	Critical point to reinvigorate programs, recapture market and organizational viability	Lost will, energy or reason to exist

The seven stages can be examined through five capacity building requirements (*programs, management, governance, financial resources and systems*). Kenny Stevens provides an approach for diagnostically placing nonprofit organizations into one of the seven-lifecycle

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<sup>2</sup> Nonprofit Lifecycles: Stage-Based Wisdom for Non-Profit Capacity. Susan Kenny Stevens. Stagewise Enterprises. Inc. Minneapolis, MN, 2001.

stages. Diagnostic Characteristics for each capacity area describe an organization in that area for each stage, while Performance Outcomes describe what is required to move to the next stage in each area. Together Diagnostic Characteristics and Performance Outcomes capture the type of predictable tasks and challenges most organizations face at each stage of development.

As with other stage-based approaches, progress is not always steady, forward or coordinated. A museum could enter the *decline* stage directly from the *start-up* or *growth* stage. A two-year old museum with a new 20,000 square foot facility might be in the *idea* stage for systems, in the *start-up* stage in *governance* and in the *growth* stage for *programs*. Regardless of which stage a museum is in overall, moving from one stage to the next requires strengthening its current position and increasing organizational capacity. The lifecycle challenge is to achieve balance or alignment among the five capacity building components.

Different demands on an organization at each stage translate into different demands on a board, as well. For instance in *governance* during the *start-up* stage, board members have a personal connection to the mission or to the founder. To move into the *growth* stage, however, the board must move beyond “friends” and recruit outside professionals who bring increased expectations for performance. During the *growth* stage, committee structure, officers and recruitment processes are established. By the beginning of the *mature* stage, the board is a policy-oriented board that sets direction and leaves management to the director.

As extensions of the board, board committees – including education – must also reflect these shifts in the organization. An excellent education committee for a *mature* organization will be a disaster for a *start-up*. It will never get off the ground. Conversely, a museum will have trouble moving from *start-up* to *growth* stage or *growth* to *mature* if its education committee stalls in the *idea* or *start-up* stage. To move forward, there must be a fit between the lifecycle stage of an organization and the profile of its education committee.

## EDUCATION COMMITTEES ACROSS LIFECYCLE STAGES

The following framework for education committees reflects a variety of shifts across the lifecycle. Using Kenny Stevens seven stages, each lifecycle stage is captured briefly, accenting the characteristics salient to an education committee’s work. Committees are profiled at each stage along seven key attributes: committee status and composition; focus and decision-making purview; meeting schedule, supporting resources; and typical challenges. For the purposes of this framework, the *decline*, *turnaround* and *terminal* stages have been combined into two stages: *decline-turnaround* and *decline-terminal*.

IDEA STAGE: A community need brings together a small group of committed people to organize around a founding idea. The challenge of this stage is to mobilize others and convert an idea into action.

Committee Status. A small working group of originators giving shape to the museum by defining its educational focus.

- Focus. The museum's educational purpose, its content areas and the museum's target audience in the context of the purpose, exhibits and program offerings of area museums, family venues and other comparable museums.
- Decision Making. Develop and recommend the mission, vision, values or content focus to the full board, if one exists, or adopt it in lieu of the board.
- Membership. The founder(s) and original board members.
- Meeting Schedule. Frequent but not regular meetings, often in response to external requirements such as meeting with funders or city officials.
- Resources. Friends, family and local educators; other museums; museum associations and other professional organizations.
- Challenges. Defining a focus that is compelling, relevant and will attract broad interest; communicating the educational vision; recognizing that expertise and resources exist outside the originating group and accessing them.

START-UP STAGE: In the beginning stages of operation, a museum's *program* offerings (including exhibits) tend to lead while *systems* lag. While passion and personal commitment continue to run high, the museum must build a durable organization.

Committee Status. A working committee created by the board responsible for oversight in planning the new museum's exhibits and programs.

- Focus. The content focus and topics of new exhibits; how the museum will serve different age or audience groups; how the museum's educational program supplements the schools; educational partnerships to pursue.
- Decision Making. Review and endorse for board approval. Examples: review and recommend exhibit topics, concepts, phase documents, designs. Represent the board's interests with consultants and contractors. Recommend exhibit topics; screen and recommend consultants, designers and fabricators to the board for contract. Explore, evaluate and recommend potential long-term partnerships.
- Membership. Four-to-six members, often chaired by the founder; appointed for specific terms to coordinate with exhibit planning and museum opening schedules.
- Meeting Schedule. Monthly meetings. Meeting schedule may change to frequent and regularly scheduled meetings if the committee is involved in planning exhibits.
- Resources. Staff liaison: the museum's most senior education manager, if one exists or the executive director, if one exists. Subcommittees may be involved in actual exhibit planning work rather than the full committee. Museum planning consultants or exhibit designers provide targeted expertise. Content or community advisors are tapped for exhibit or program review, resource identification or networking.

- Challenges. A willingness to follow standard processes and procedures; using existing practices developed by other similar museums and not re-inventing the wheel; documenting exhibit decisions and process for future reference; recognizing the need for and accessing outside expertise; serving audience interest rather than committee interest; understanding boundaries between board and staff.

GROWTH STAGE: Mission, exhibits and programs have taken hold, but demand and opportunities exceed capacity and resources. To keep up, the museum grows through small, planned steps or a major expansion. But frequently growth just happens. This period requires focus and efficiency.

Committee Status. A standing board committee described in the by-laws and charged with responsibility for the museum's broad educational interests.

- Focus. Define mission and education more clearly; understand the museum's educational value to the community and its public profile; add value to staff's implementation of educational activities; monitor for quality and adherence to strategic educational goals.
- Decision Making. Review for staff implementation and endorse for board approval. Examples: annually review staff work on educational priority issues that emerge from the strategic plan; review annual exhibit schedule; review staff choices for exhibit topics and basis for selection; endorse education or exhibit master plan; review evaluation results and implications for educational direction. Does not choose exhibit topics.
- Membership. Five-to-seven board members well-grounded in organizational vision and strategic view, some of whom have specific, related expertise; appointed by the committee chair for one-or-two year terms. Supplement with a few people from outside who have influence in education.
- Meeting Schedule. Six-to-eight times per year.
- Resources. Staff liaison: museum's most senior education manager with back-up from executive director; augment with outside experts on special topics.
- Challenges. Building staff capacity and credibility with the board; clear delineation between board and staff roles and responsibilities; focus on organizational priorities rather than on member interests or assumptions; avoiding traps to creativity and response to opportunities.

MATURE STAGE: A well-established museum operates smoothly and has a community reputation for consistently relevant and high quality services and products. It knows its audience and its audience knows the museum. It is a leader among its peers. Its challenge is to stay renewed, vibrant and in touch with its audience.

Committee Status. A standing committee described in the by-laws, charged with responsibility for the museum's broad strategic educational direction.

- Focus. Understanding the audience and matching levels of service to different segments; the museum's role in the community; the feasibility and strategic fit of major new programmatic initiatives.
- Decision Making. Review for staff implementation and endorse for board approval. Examples: review master plan; review annual exhibit and program schedule; review directions from strategic plan; review and endorse projects that require fiduciary risk; serve as a sounding board for new initiatives and appropriate but potentially controversial projects.
- Membership. Five-to-seven board members well grounded in organizational vision and strategic view augmented with 2-3 community members or educational advisors. All appointed by the committee chair for staggered one or two year terms. Members understand governance roles; carry out their duties in the best interest of the organization; and focus outward on the museum's role in the community.
- Meeting Schedule. Four-to-six meetings per year.
- Resources. Staff liaison: museum's most senior education manager with back-up from executive director; task forces (finite term, focused) to explore high-level issues; clear delineation between board and staff roles and responsibilities; specialists from outside on targeted topics.
- Challenges. Remaining audience centered; channeling specific suggestions (such as board member interests or ideas) through existing processes and procedures and, as appropriate, integrating them with existing programmatic vehicles.

DECLINE-TURNAROUND STAGE: A typical setback in a difficult external environment or a series of disappointments can start a museum into a period of decline at any lifecycle stage. As a result, a museum may lose contact with its audience or lose funder confidence. If a board takes decisive action and meets the crisis, it can turn the museum around. There must be a fundamental re-focus on mission and market but there may also be major restructuring of management, finances, operations and marketing.

Characteristics of the education committee during the *decline* stage will reflect whatever stage the museum is in as decline sets in. During turnaround, the education committee would very likely be reformed and would refocus its work to reflect new priorities or new structure depending on the nature and source of the museum's decline. If a turnaround is successful, a museum may find itself in a *startup* or *growth* stage with a corresponding education committee profile.

Committee Status. A board task force appointed by the committee or board chair for specific term or outcome.

- Focus. A sharpened educational focus in support of an affirmed or revitalized mission; the museum's educational value to its audience.
- Decision Making. Review staff work and make recommendations for staff implementation as appropriate. Evaluate current educational products and services; adjust exhibit, programs and projects to reflect new thinking, priorities and

- structure; regularly review exhibit and program performance information; evaluate new educational and partnership opportunities. Examples: program or project termination or redirection; launching educational planning process.
- Membership. Three-to-five board members who have internalized the need for change.
  - Meeting Schedule. As necessary during a defined time period.
  - Resources. Staff liaison: a turnaround manager or senior education manager. (The museum's executive director who was at the helm during the *decline* stage is typically not the leader suited to oversee a *turnaround*.) Outside consultants with targeted expertise.
  - Challenges. Regaining education and audience focus at the appropriate scale for a fragile organization; retaining staff morale; willingness to make difficult decisions; coordination with other board task forces.

DECLINE-TERMINAL STAGE: The same setback in a difficult external environment or a series of disappointments can lead to a *terminal*, rather than *turnaround* stage. When a board fails to face the crisis or if the crisis is too great for the organization's capacity, the museum is at the far end of the lifecycle with few options. Without the capacity or reason to stay alive, the museum calls it quits.

Characteristics of the education committee during the *decline* stage will reflect whatever stage the museum is in as decline sets. As the board works through the *terminal* stage, education committee work would very likely be assigned to a subcommittee or be absorbed into the board's work to acquit itself of its legal and fiduciary responsibilities.

Committee Status. A board subcommittee or designated board members.

- Focus. The board's educational, programmatic, project and partner obligations.
- Decision Making. Disposition of exhibits to another museum or organization; determining status of program grants; assure execution of grant monitoring reports; assure open, honest communication to program partners.
- Membership. A small group of board members willing to execute the museum's responsibility in an honorable manner.
- Meeting Schedule. As needed to complete the work.
- Resources. Staff liaison may be unavailable: if possible, the museum's most senior educational manager or executive director.
- Challenges. Honest communication; avoidance of blame; being respectful of the museum's past.

## GETTING STARTED

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It's never too early or too late to shape an education committee for its lifecycle work. Redirecting an education committee, however, is no easy task. Existing dynamics,



personalities and precedents shape any current education committee and must be factored into creation of a new committee for new work. But a framework that profiles an education committee across the lifecycle is a starting point for change. It offers a shared and positive view of what a committee can be and can contribute to the museum for those most responsible: the executive director, board chair, committee chair and education director.

Change can begin with diagnosing where a museum is in its lifecycle. This can be an extensive process for which Kenny Stevens' book is an excellent resource. It can also be a simpler process using the summary of the lifecycles approach in this paper including the summary of the lifecycles matrix below. The matrix not only summarizes the Diagnostic Characteristics and Performance Outcomes for *governance* across the seven stages, but also highlights how an education committee might reflect this change.

A comparison between a current education committee's structure, composition and focus, and the education committee profile matched to a particular lifecycle stage provides both a direction to follow and a model to pursue. Scanning the seven attributes, such as profile, focus, etc., highlights how a current education committee compares with what it might be. The comparison may identify where to start and indicate some manageable steps in the most promising areas. It can also inform decisions at a more granular level, from selecting a committee chair, to membership recruitment, to framing agendas, to shifting vocabulary.

One aspect of re-orienting a committee and its work is understanding and internalizing the framework and the committee profiles. This occurs through familiarity and use, but also by recognizing the broad changes that occur across the lifecycle. General trends extend across profiles for each attribute, although less so across the *decline*, *turnaround* and *terminal* stages. The trends reflect a move from internal to external, from details to the big picture, from doing to policy. The trend applies to both small and large museums. Even in a small museum in which committee members need to occasionally take on staff roles, as a committee they need to shift their mindsets from implementation to policy during the *growth* and *mature* stages.

Committee Status of the committee evolves from personal, informal and ad hoc to organized, professional and long-term.

- Focus of the committee's work changes from exhibits and programs to the museum's educational position and impact in the community; from short-term to long-term thinking; from a staff-like focus to a board focus; and from internal focus on specific exhibits and programs to an external focus on the audience and community.
- Decision making evolves from making specific decisions towards review of educational direction for staff implementation to endorsement of staff work for board approval.
- Membership of the committee shifts from personal connections for recruiting members to board appointment of members; and from an all-museum member committee to additional representation by a few community members with a high educational profile.

- Meeting Schedule decreases in frequency reflecting reliance on annual processes and staff work.
- Resources change from generalist to specialist; from board to staff; from learning-on-the-job to accessing targeted experience.
- Challenges: The more professional and experienced the staff is, the harder it is to know what the role of the committee is.

## SUMMARY

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Changing education committees is about organizational growth and change. Although the degree of change required for one or another museum to shift to a new committee profile may be greater or smaller, in every case, it requires change. The shift may take a change in mindset; it may require increased capacity; it may take several attempts, creativity and patience. In any case, it will take time.

When an education committee begins to evolve into its new form, however, it will be worth the effort as the committee, and through them, the full board becomes an asset to the museum in increasing its educational value to its audience and its community.

# LIFECYCLES MATRIX

STAGE	IDEA	START UP	GROWTH	MATURE	DECLINE	TURN AROUND	TERMINAL
OVERVIEW	Community need sparks founding idea	Beginning operations: high passion, systems lag	Demand exceeds systems and capabilities.	Reputation for steady, relevant, vital services	Lose touch with audience; low funder confidence; declining attendance; weak financials	Critical point to reinvigorate programs, recapture market and organizational viability	Lost will, energy or reason to exist
GOVERNANCE  Diagnostic Characteristics	<ul style="list-style-type: none"> <li>No board exists, only supporters with personal connections to mission.</li> </ul>	<ul style="list-style-type: none"> <li>Members have personal connection to mission or founder.</li> <li>High respect for charisma, self-sacrifice, sweat equity of founder can cause members to defer rightful board decisions.</li> </ul>	<ul style="list-style-type: none"> <li>Board moves beyond "friends;" recruits outside professionals who bring increased expectations for performance.</li> </ul>	<ul style="list-style-type: none"> <li>Policy-oriented board sets direction; leaves management to director.</li> <li>Board plays leadership role; competent in keeping organization focused &amp; vital.</li> <li>Board organized for maximum effectiveness with a structure for leadership and culture continuity.</li> </ul>	<ul style="list-style-type: none"> <li>Board is unaware something's wrong; thinks things run smoothly; don't take action until money runs out.</li> <li>Lack of organizational "spark" or one too many crises ; ennui, low attendance.</li> <li>Board may operate with a strategic plan but focuses on "what we want to do" not community need.</li> <li>A new board member is the "whistle blower;" calls status quo into question; may set turnaround process motion.</li> </ul>	<ul style="list-style-type: none"> <li>A core of committed board members are ready to do what is needed to restore organizational integrity</li> <li>Turnover has shrunk the board to only the committed.</li> <li>Board supports turnaround manager in leadership role; helps regain institutional credibility.</li> </ul>	<ul style="list-style-type: none"> <li>Board has lost its collective drive to continue and may exist in name only.</li> </ul>
GOVERNANCE  Performance Outcomes	<ul style="list-style-type: none"> <li>A board has been formed, by-laws developed; articles of incorporation filed.</li> </ul>	<ul style="list-style-type: none"> <li>Membership expanded beyond friends of founder</li> <li>Members understand the non-profit corporation/ sole proprietorship distinction; make decisions in the <i>organization's</i> best interest.</li> <li>Enough members are committed so</li> </ul>	<ul style="list-style-type: none"> <li>Transition from staff-driven to shared board/staff ownership; members understand governance roles.</li> <li>Board members regularly attend meeting and are willing to make informed, time-sensitive</li> </ul>	<ul style="list-style-type: none"> <li>Board operates in a policy mode and understands governance, legal and fiduciary responsibilities.</li> <li>Board has determined how to monitor organizational impact on community.</li> <li>Board committee structure is</li> </ul>	<ul style="list-style-type: none"> <li>Board regularly reviews client performance information and satisfaction measures addition to financial reports.</li> <li>Members attend board meeting on a regular basis.</li> <li>Board members are future focused, not complacent, and</li> </ul>	<ul style="list-style-type: none"> <li>Board has affirmatively reconnected with the organization and is eager to help restore institutional integrity.</li> <li>Small but highly committed group takes the organization forward.</li> <li>Board</li> </ul>	<ul style="list-style-type: none"> <li>Board fulfills its due diligence requirements regarding disposition of assets, closing accounts and distributing remaining funds to another nonprofit.</li> </ul>

		the board has begun to set direction; organizational ownership no longer resides with staff alone.	decisions. • Committee structure, in terms of office and recruitment processes are established.	clearly defined, members appropriately competent and diverse, with rotating terms of office.	serve as program ambassadors, keeping their ears to the ground of community need. • Someone is willing to call the board's attention to organizational "slippage" and develop a game plan to correct it.	provides objectivity, support and advice to turnaround manager.	
EDUCATION COMMITTEE STATUS	Education committee function carried out by founder and board.	A working committee focusing on exhibits and programs.	A board standing committee on education.	A board standing committee on education.	The committee reflecting the museum's stage as <i>decline</i> sets in.	Board Task Force	The board

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