**OPM Workshop
Evaluating Leadership Development Programs: Easing into Kirkpatrick *Levels 3 & 4***

**TRAINING EVALUATION FIELD GUIDE CASE STUDY**

**NATIONAL MUSEUMS AGENCY (NMA)**

The National Museums Agency (NMA) is a fictitious federal government agency that is responsible for operating a system of over 50 museums in Washington, D.C. The NMA’s mission is to increase and diffuse knowledge for the entire world. Their vision is to preserve our heritage, discover new knowledge and share our resources with the world.

**NMA’s strategic goals are:**

Build and maintain a strong agency leadership pipeline and talent pool for leadership continuity and viability

Develop future leaders who are ready to step into higher positions

Enhance and grow and strong pan-institutional leadership team

In recent years the board of regents mandated that a leadership development program (LDP) was initiated to ensure that a strong leadership pipeline exists to maintain the viability of the NMA. Recent events that precipitated the request included **a front-page expose of funds misuse by one museum director, reduced donations and lack of a consistent succession plan across the organization. Finally, there was an apparent lack of pan-institutional cooperation among the museums. Competition between museums had reached a level that surpassed friendly competition.**

The NMA training department was tasked with creating the LDP that would meet the demands of the board of regents, and ultimately create a strong culture of leadership within the organization.

**Business Need**

• Maximize and demonstrate impact from donations.

• Create leadership pipeline for sustained institutional success.

• Build a pan-institutional culture where decisions are made with the betterment of the entire NMA in mind.

**Key Stakeholders**

The key stakeholders are the board of regents. This group is made up of members of congress, members of other federal government agencies, large donors and museum experts.

**Roles and Responsibilities**

Senior leaders of each museum would contribute a share of the funds and other resources needed, and hold everyone accountable. They would also provide up-front, public support of the initiative.

The training department would work with senior leaders and be responsible for scoping the entire initiative, managing all of the steps, and provide necessary training and job aids for all levels of leadership.

Leaders, managers and supervisors within each museum would be responsible for actual job performance, including on-the-job training, coaching, and monitoring of critical behaviors.

**Level 4 Result**

The desired Level 4 Result was to sustain the ability of the NMA to share knowledge with the world.

**Level 4 measurement**

The sustainment of the NMA would be measured in two ways:

1. Donation levels

The organization is primarily funded through donations, so if donation levels drop there is a chance that museums will need to reduce the number of exhibits, limit hours or begin charging admission fees. All of these things would limit the ability to satisfy the organizational mission.

2. Cross-organizational agreement on funding usage

Cross-organizational teams would be required for all major initiatives. Peer accountability would ensure that funds are put towards the best possible use for the entire organization.

**Determine if Level 4 is reasonable to accomplish with allocated resources**

The NMA has been donor-funded for decades. There is no reason to believe this is not a viable strategy for the years to come. The new requirement for cross-organizational teams would help to ensure that funding that is available would go to the best possible uses.

**Collateral and intangible benefits**

Intangible benefits that would likely be realized from the LDP include increased retention and job satisfaction for not only the leaders who go through the program, but from their direct reports. A strong leadership culture would likely also preclude any further embarrassment from unethical behavior or misuse of funds.

**Level 3**

**Determine Critical Behaviors**

Museum leaders with the highest level of donations were assembled to discuss what makes them successful at obtaining support. They were also asked to discuss their approach to teambuilding and leadership development. Three critical behaviors for museum leaders emerged as those most critical to the viability of the NMA:

1. Participate in cross-organizational teams for major initiatives and decisions.

2. Speak professionally to build public trust and awareness of the NMA.

3. Mentor at least one individual for every leadership position.

The first critical behavior encompasses the need to work with a pan-institutional vision. Teams that cross museums that work together to make decisions ensure that funding is used in the best possible way for the entire organization. The second critical behavior addresses the need to sustain donations.

The third critical behavior speaks directly to the need for a leadership succession plan. For every leadership position at least one individual should be in the grooming process should they need to step up in the future.

**Ensure critical behaviors relate to training**

Training needs were identified for the second and third critical behaviors only. The first critical behavior would be supported by the training team with a job aid and assistance in setting up an accountability system.

**Current practice of critical behaviors**

The NMA had varying levels of the critical behaviors being performed from museum to museum. These things were currently optional and not monitored.

**Reasons for the current level of application**

A gap analysis was conducted to determine why the behaviors were not being practiced by every museum. This was done via a survey and interviews of workers and supervisors. The following were the most common reasons:

• No accountability system

• Goals were created with inherent competition; this discouraged collaboration

• Lack of knowledge as to where to get education on the topic

**Types of support and accountability**

A group of training leaders, museum managers and workers met to discuss which drivers would be both manageable and effective. A balance of support and accountability was deemed to be necessary to get the required critical behaviors to necessary levels.