

Tag! Children’s Museum of St. Augustine
Organization Assessment Results and Recommendations
DRAFT May 19, 2020
Prepared by the Nonprofit Center of Northeast Florida

In February-April 2020, tag! Children’s Museum of St. Augustine (tag) participated in an organizational assessment, administered by the Nonprofit Center of Northeast Florida. The organizational assessment consisted of four parts:

1. Background information – a variety of documents provided by the organization, as well as an initial orientation meeting with the Executive Director and Board Chair.
2. Online board assessment – completed by 12 Board members and the Executive Director for a 100% completion rate.
3. Online operations assessment – completed by 5 staff and Board members doing operational work, a 100% completion rate of those asked to participate.
4. Stakeholder interviews – Nonprofit Center completed phone interviews with three stakeholders.

The results of each part are summarized below and will be followed by a suggested action plan for the organization.

If you have any questions about this summary, please contact Leah Donelan McDermott at lmcdermott@NonprofitCtr.org or 904-504-0309.

Background Information

The mission of tag! Children’s Museum is to create transformative, play-based opportunities to discover, explore, and innovate. The vision of tag! Children’s Museum is to create transformative, play-based opportunities for families.

Tag! was founded by a group of parents and business leaders in the community who recognized the need for a cultural environment that promotes healthy, social, and emotional development for children. It incorporated as a 501(c)(3) charitable organization in 2007. It provides:

- Programming in five mission areas
 - History and culture
 - Citizenship and compassion
 - Environmental stewardship
 - Health and wellness
 - STEAM
- Onsite workshops for children and families
- Offsite outreach and collaborative partnership programming
- Specific grant-funded programming (Let’s Do Chemistry and Explore Earth and Space in 2019)

From 2016-2019, 7,000 children and families were impacted by tag. In addition, tag is in the middle of a capital campaign, a four-acre museum design and build, and securing a USDA federal loan.

For the fiscal year 2018, tag’s cash income was approximately \$164,000 and cash expenses were approximately \$257,667, not including the capital campaign. Tag’s assets equaled approximately \$1.76M. Its estimated expenses for 2020 were \$256,104. Tag currently has a staff of two full-time and two part-time employees, 40 volunteers, and a board of 12 community members. Tag does not currently have a strategic plan. Their website is <http://www.tagmuseum.org/>.

Online Board Assessment

Board members were asked to assess their group performance for general Board roles and responsibilities. The Board members also prioritized their Board work, based on the goals and needs of tag. The survey results were compiled, and only aggregate results are shared with the organization.

Basic Board Roles and Responsibilities

Using BoardSource's *Ten Basic Responsibilities of Nonprofit Boards* as the criteria for establishing Board roles and responsibilities, Board members ranked their collective performance in each area on a scale of 1 (low) to 4 (high). In the subsequent question, Board members were asked to identify three of the ten responsibilities that were most important for the tag Board to focus on right now. The priority level number is the aggregated number of votes for that responsibility, so numbers will total more than the number of respondents. The summary results of the two questions are below. Board responsibilities highlighted in yellow indicate our recommended focus areas, usually consisting of a low score and a high priority level. Those highlighted in orange are a high priority area with a slightly higher score and will be included in the recommendations in some way. Those not highlighted are not currently a priority and should not be included in the organization work plan in a significant way for now.

Basic Board Responsibility	Average Score (1-4)	Priority Level
Ensure adequate financial resources	2.23	11
Protect assets and provide financial oversight	3.15	8
Support and evaluate the chief executive	3.15	3
Ensure effective planning	3.23	6
Monitor and strengthen programs and services	3.31	4
Build a competent board	3.46	2
Select the chief executive	3.54	1
Enhance the organization's public standing	3.69	5
Determine mission and purposes, and advocate for them	3.77	1
Ensure legal and ethical integrity	3.92	0

Advanced Board Roles and Responsibilities

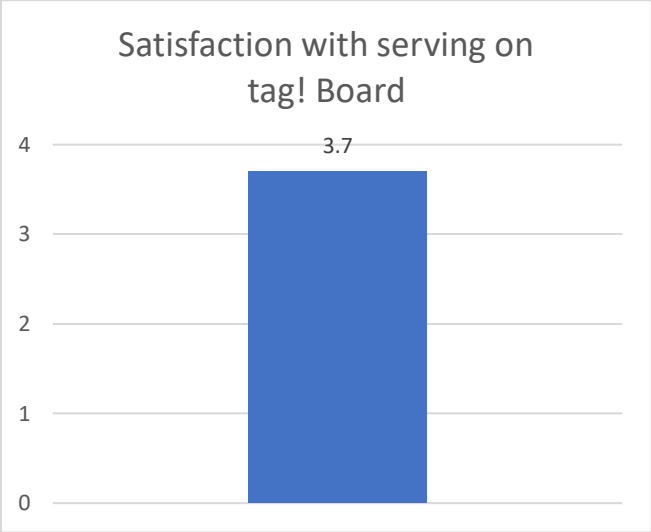
Using Chaite's *Governance as Leadership* as the criteria for establishing more advanced Board roles and responsibilities, Board members ranked their collective performance in each area on a scale of 1 (low) to 4 (high). In the subsequent question, Board members were asked to identify two of the eight responsibilities that were most important for the tag Board to focus on right now. The priority level number is the aggregated number of votes for that responsibility, so numbers will total more than the number of respondents. The summary results of the two questions are below. Board responsibilities highlighted in yellow usually indicate high priority areas that also have a relatively low performance score, which means they will be included in the recommendations. Those highlighted in orange are of high priority, but slightly higher scores. Those not highlighted are not currently a priority and should not be included in the organization work plan in a significant way for now.

Advanced Board Responsibility	Average Score (1-4)	Priority Level
Assess and re-assess stakeholder positions and commitments	2.92	6
Ask hard questions and promote dialogue	3.08	6
Re-examine goals	3.23	1
Scan the environment	3.25	3
Practice reflective thinking	3.31	2
Reframe tough challenges	3.46	3
Explore options	3.54	5
Bring understanding of context, culture, and policy to the discussion	3.54	0

Personal Satisfaction

Board members responded to the question: How satisfied are you with serving on the tag Board?

The result was an average score of 3.7 out of a possible 4.



Because this is the first time the assessment has been administered, the personal satisfaction score can be used as a benchmark to measure change over time.

Additional Comments

Board members were given the chance to leave additional comments about their experiences on the Board. The themes from those comments are summarized below. The number in parentheses is how many times a particular comment was mentioned.

- Board commitment
 - Would like to be more involved/wish I had more time to commit (2)
 - Disappointed in Board commitment
 - I love being on the Board
- Board engagement
 - Need to support Kim more so she can be more effective
 - Need diverse Board members with Board experience
- Fundraising
 - The greatest challenge
 - Frustrated with financial institutions
 - Need a firm commitment on ground breaking

Board Assessment Summary

The top areas of focus that the Board prioritized for itself are (in no particular order):

- Fundraising
- Financial oversight
- Strategy and planning, including asking hard questions, promoting dialogue, and exploring options
- Enhancing public standing
- Assessing stakeholder positions
- Board governance and engagement

Online Operational Assessment

The organizational assessment ranks five areas – organizational development, leadership development, program development, revenue development, and community engagement – through 46 unique indicators. Each indicator has a ranking scale of 1 (low) to 4 (high), and participants were asked to choose the ranking that best described tag. If an assessment participant was not involved with a particular indicator or didn't know the circumstances, they were asked to leave it blank. If the indicator did not apply to the organization, they were asked to mark N/A.

The results of all five completed assessments were averaged together to identify the consensus areas needing attention and/or improvement.

The five areas and their indicators, along with their average score, are:

AREA	INDICATOR	SCORE (out of 4)
Organizational Development	Physical Infrastructure - buildings and office space	2.4
	Technological Infrastructure - computers, applications, network, and e-mail	2.4
	Knowledge Management	2.6
	Staff Experience and Capacity	2.6
	Financial Operations Management	2.6
	Decision Making	2.8
	Individual Job Design	3
	Technological Infrastructure - telephone/fax	3
	Strategic Planning	3.2
	Senior Management Experience and Commitment	3.2
	Day-to-day Operations	3.2
	Databases	3.2
	Processes and Procedures (e.g. decision-making, planning, personnel, financial, etc.)	3.2
	Vision	3.4
	Shared Beliefs and Values	3.4
	Mission	3.6
	Staff Composition	3.6
	Legal and Liability Matters	3.6
Leadership Development	Dependence on CEO/ED	2.6
	CEO/ED - understanding impact	2.8
	Board - composition and commitment	3
	CEO/ED - financial judgement	3
	Board - governance	3.2
	CEO/ED - strategic and analytic thinking	3.2
	CEO/ED - experience and standing	3.2
	Development of a High-functioning Leadership Team	3.4

	CEO/ED - people and organizational leadership/effectiveness	3.4
	Board - involvement and support	3.6
	CEO/ED - passion and vision	3.8
Program Development	Performance Analysis and Program Adjustments	2.6
	Program Goals/Targets	2.6
	Program Coordination	3
	Program Growth & Replication	3.2
	New Program Development	3.4
Revenue Development	Funding Model	2
	Fundraising	2.2
	Revenue Creation	2.5
	Board Involvement & Participation in Fund Raising	2.6
	Financial Planning and Budgeting	3
Community Engagement	Influencing of Policy Making	1.75
	Local Community Presence and Involvement	2.6
	Website	2.6
	Public Relations and Marketing	2.8
	Volunteers	3
	Monitoring of Landscape	3
	Partnership and Alliance Development and Nurturing	3.4

Areas Scores

The average score (out of 4; 4=high), along with the average priority rating (1=highest priority) assigned by the participants, for each of the focus areas is:

AREA	AVG SCORE	PRIORITY
Revenue Development (RD)	2.46	1
Community Engagement (CE)	2.74	2
Program Development (PD)	2.96	5
Organization Development (OD)	3.06	3
Leadership Development (LD)	3.2	4

Focus Indicators

The 15 indicators with the lowest scores are as follows. This list includes 80% of the Revenue Development indicators. Those highlighted in orange were marked as priority items by at least two respondents.

AREA	AVG SCORE	NA/BLANK	CATEGORY
Influencing of Policy Making	1.75	1 blank	CE
Funding Model	2	1 blank	RD
Fundraising	2.2		RD
Physical Infrastructure - buildings and office space	2.4		OD
Technological Infrastructure - computers, applications, network, and e-mail	2.4		OD
Revenue Creation	2.5	1 blank	RD
Performance Analysis and Program Adjustments	2.6		PD
Program Goals/Targets	2.6		PD
Local Community Presence and Involvement	2.6		CE
Knowledge Management	2.6		OD
Staff Experience and Capacity	2.6		OD
Financial Operations Management	2.6		OD
Dependence on CEO/ED	2.6		LD
Board Involvement & Participation in Fund Raising	2.6		RD
Website	2.6		CE

Additional Comments

At the end of each area, assessment participants could leave additional comments. Those comments are summarized here.

- Strategy
 - Mission and vision are important but are influenced by shared beliefs and values and would be difficult to execute without them
 - Program outcomes and impact measurements will be more fully implemented once the museum opens
- Fundraising
 - As of April 1, the museum has a contract with an outside fundraising consultant
 - Need more marketing on the capital campaign
- PR
 - Need more of it
 - Working on a website redesign

Strengths and Opportunities

In a short-answer format, assessment participants were asked to share the three things tag is great at (strengths) and the three things tag needs help with (opportunities). The number in parentheses is the number of times that particular item was mentioned.

Strengths:

- Programming (4)
 - Creative
 - Innovative
- Connecting with the community (3)
 - Partnerships
 - Networking
- Adaptive Board and staff (3)
- Advocates of mission (2)
- Board recruitment and retention
 - Knowledgeable
- Customer service
- Team collaboration and strategic planning

Opportunities:

- Fundraising (9)
 - Major gifts
 - Capital campaign
 - Other/general
- Board development and diversity (3)
- Technology
- ED and Staff leadership
- Marketing a new cultural institution
- Organizational strategy

Operational Assessment Summary

To identify the most important operational areas for tag to focus on, we looked for a cross-section of areas that were a challenge and identified as a priority for the organization. Those include (in no particular order):

- Fundraising, including PR/marketing
- Program goals and analysis
- Local community presence and involvement
- Board governance, composition and engagement
- Technology

In addition, the following were marked as priority areas, even if they are being done relatively well right now (in no particular order):

- Strategic planning
 - Ongoing strategic thinking
- Processes and procedures
- Staff development

Stakeholder Interviews

Tag chose three stakeholders to participate in interviews about their experience with the organization. The stakeholders interviewed were:

Chuck and Diane Newman

Donors, parents of Board member

Doug Wiles

Donor, insurance agent

Mindy Cevera

Donor, tag! Advisory Board member

The stakeholders were asked six questions:

1. Why do you support tag?
2. What are their greatest strengths? What do they bring to the community that no one else does?
3. What are their greatest challenges?
4. What are their greatest opportunities? Are there things you think they should be doing?
5. Who should be aware of tag who isn't/who should be involved who isn't?
6. How would you describe the quality of your experiences/interactions with tag?

Overall, stakeholder experiences with tag are positive. Stakeholders note the Board and staff's passion for the museum. They describe the organization as professional, but warm, and honest with good communication. Stakeholders all got involved with tag because they believe in and see the need for the mission. Most also had a connection to a Board member and were asked to get involved.

The strengths and challenges of the organization, as described by stakeholders, include the following:

Strengths	Challenges
<ul style="list-style-type: none">• Leadership attitude (3)<ul style="list-style-type: none">○ Enthusiasm○ Passion○ Visionary	<ul style="list-style-type: none">• Building delays (3)<ul style="list-style-type: none">○ Donors need to see some progress○ May eventually affect credibility○ Add a sign that says coming soon
<ul style="list-style-type: none">• Programming (3)	<ul style="list-style-type: none">• Fundraising (2)
<ul style="list-style-type: none">• Mission (3)<ul style="list-style-type: none">○ Perfect fit for our community○ Specifically for children○ Acts as an advocate for children	<ul style="list-style-type: none">• Location off the beaten tourist path
<ul style="list-style-type: none">• Executive Director (2)<ul style="list-style-type: none">○ Her perseverance and passion	<ul style="list-style-type: none">• Previous fundraising professional
<ul style="list-style-type: none">• Board member involvement	
<ul style="list-style-type: none">• Focus on fundraising	

The number in parentheses is the number of times a particular item was mentioned.

Some opportunities that were identified include:

- Breaking ground (2)
 - And the fundraising opportunities from that press coverage
- Summer programming (2)
 - Filling the gaps that others have had to leave
- Surrounding property development
- Additional influential Board members
- Adding/strengthening donor events and communications

Stakeholders said the following people should know about tag:

- Northeast Florida region – within a 45-minute drive of St. Augustine
- Ponte Vedra residents, especially those who could be donors
- Grandparents
- People excited by the mission
- The media, once the museum breaks ground
- New and expanding businesses
 - Especially ones who are busy and/or thriving through COVID-19
- Delores Weaver (The Community Foundation of Northeast Florida)

Tag! Children's Museum Strengths

Although we always want to improve our organizations to more effectively meet our mission, it is also important to recognize and celebrate our successes and strengths. Throughout every part of the assessment, several organization strengths were identified, including:

- Vision for the museum and the community
- Passion for the mission
- The human resources that share the vision and passion with the community
- Programming
- Connecting with the community
- Being adaptive

Recommended Action Plan

Combining the feedback from background information, the Board assessment, the organizational assessment, and stakeholder interviews, the Nonprofit Center puts forth these action plan areas, in no particular order, for Board discussion. The areas do not operate in silos – in fact, to make progress in any one area will probably require some attention to at least one additional area. Based on Board feedback, these draft areas will be edited and expanded on, to be put into a final action plan and calendar.

- **Fundraising (B, O, ST)**
 - Immediate capital needs
 - Longer-term needs
 - Donor events/communications
 - Board responsibilities and engagement
 - PR/marketing opportunities

What are the barriers to fundraising right now? What activities do you see as fundraising possibilities in the future? What is difficult to manage? What do you see as the Board's role in fundraising? How does this tie into public relations and marketing?

- **Board governance and engagement (B, O, ST)**
 - Composition and recruitment
 - Changing roles and responsibilities
 - Board training and expectations

Do you need additional Board members? Do you see the role of the Board/members changing with the museum's evolution? How would you like Board work to be different? What does the Board need to do its job?

- **Strategy and planning (B, O)**
 - Ongoing strategic thinking
 - Strategic planning
 - Asking hard questions
 - Promoting dialogue
 - Exploring options
 - Program goals

- Program analysis and impact measurements
- Assessing stakeholder positions

Are we interested in a formal strategic planning process? Can we start planning strategy outside of building/construction planning? Are there ways to include strategy development into regular meetings/operations? Is this the right place for stakeholder assessment?

- **Enhancing public standing (B, O)**
 - Local community presence and involvement
 - PR/marketing

What would success in PR and marketing look like? How does this tie into fundraising? How do you want the local community involved? What would you like to have in this area that you don't currently?

- **Financial oversight (B)**
 - Training for Board and ED
 - Cash flow management and planning
 - Contingency planning

What is your main concern with financial oversight? What else fits here? What would you need to feel more comfortable with financial oversight and asset protection?

- **Operations (O)**
 - Technology
 - Processes and procedures
 - Staff development

What technology do we need? What policies and processes are you missing? How do we get these done in a timely manner and in a way that gets buy-in from the whole organization? What does the staff need to feel supported and offered growth opportunities?

- **Facilities**

This wasn't specifically on anyone's list, but opening a facility will obviously have an impact on your capacity. What do we need to plan for/anticipate before we break ground and open a facility?

Other questions:

What feels like the highest priority?

What would you need external help with?

What would you tackle internally?

Calendar of Activities – TO BE COMPLETED

This will change and evolve over time and should be viewed as a starting point only.

	Action Area	Action Area	Action Area	Action Area
Immediate (next 90 days)	•	•	•	•
Short-term (within 12 months)	•	•	•	•
Long-term (within 3 years)	•	•	•	•

Nonprofit Center Support and Events – TO BE COMPLETED

- Workshops (more information and registration at <http://nonprofitctr.org/events-calendar/>)
- Convenings
- Board training and implementation help – fee based per training/project - <http://nonprofitctr.org/services/consulting-group-facilitation/>
- Community Coaches program - <http://nonprofitctr.org/services/coaching/>
- Nonprofit Center Board Bank – free listing for open Board and committee positions - <http://nonprofitctr.org/membership/board-bank/>

