The cover features a vibrant green background. A large, semi-transparent purple circle is centered, with a smaller, solid purple circle above it. A vertical purple bar runs through the center, intersecting the large circle. A dark green triangle is positioned in the upper right quadrant. The title 'THE MANUAL OF MUSEUM MANAGEMENT' is printed in a bold, black, sans-serif font, centered across the middle of the cover. A faint, diagonal watermark reading 'FOR EDUCATIONAL PURPOSES ONLY' is visible across the entire page.

THE
MANUAL
OF MUSEUM
MANAGEMENT

Gail Dexter Lord
Barry Lord

FOREWORD BY NICHOLAS SEROTA

DIRECTOR OF THE TATE GALLERY

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and
GAIL DEXTER LORD

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Foreword

I am delighted to have been asked to write the foreword for *The Manual of Museum Management*. This book provides invaluable advice and guidance for everyone involved in the creation, development and management of museums today.

It is of particular relevance to the Tate as it enters one of the most important phases in its history. The creation of the new Tate Gallery of Modern Art at Bankside in London and the development of the Tate Gallery of British Art on the current Tate Gallery site represent a considerable challenge. The effective management of valuable resources including money, space, time and staff will play a vital role in ensuring that the Tate realises its plans on time and within budget.

Museums and galleries throughout the world are changing and as we enter the 3rd millennium it is interesting to note that the numbers of visitors are growing and our profession is expanding. Increased visitor figures, however, bring with them greater challenges, more demands and added accountability. Today's museum visitor expects excellence not only in terms of exhibition and display, but in information, interpretation, catering, retail and all other services. If we are to keep our existing visitors and continue to attract new ones, then we must plan with their needs and expectations at the forefront of our thinking.

In these circumstances the conservation and care of museum collections assumes an ever greater importance. New approaches to storage will provide better conditions for objects and increased public access. There will be an increasing emphasis on preventive care, ensuring that all the works are at all times fit for study, display or loan. Access will also be improved by the development of more effective systems for both tracking and documenting museum collections.

This book contains a number of remarkable case studies from museums and galleries around the world, including two from the Tate Gallery. These provide a fascinating insight into the planning, development and realisation of a range of initiatives in very different environments. What they all reveal, however, is the need for collaboration, commitment and strategic planning.

Expanding audiences suggest that museums are playing an increasingly important role in meeting the need for intellectual and emotional stimulation that is common to us all. It is more than ever a privilege, pleasure and responsibility among museum professionals to ensure that inspiration, enjoyment and education await those who step through our doors.

Nicholas Serota
Director, Tate Gallery

Preface

Museums are one of the most successful cultural institutions of our time. Whether devoted to art, science or history, their acquisitions and exhibitions are exciting and illuminating to an ever widening range of interested visitors around the world. Nations, states, provinces, counties, cities and towns all want museums, as do many universities. Increasingly, industries and even leisure pursuits – from embroidery to balloon flying – aspire to set up a museum of their own.

It might therefore be thought that the management of these successful institutions should be a relatively straightforward matter of pleasing a known public with a popular product, while pursuing the underlying goals of scholarship and preservation. But, as almost everyone knows who is involved with the management of museums, this is no longer true, if it ever was. In the past few decades especially, the pace of change in philosophy, in technology, in funding and in public expectations has required those responsible for museums to adapt rapidly and continuously, while attempting to maintain the museum's fundamental objectives.

This guide to the management of museums in the 21st century therefore begins in Chapter 1 with the question *WHY?* Why do we need museum management, and what is its appropriate role? We then turn in Chapter 2 to the people who animate museums and the structure of museum organisation (the *WHO* of museum management); and in Chapter 3 we examine the tools available to museum leadership – the *HOW* of museum management.

This manual is for all those involved or interested in the challenge of managing and leading museums in the 21st century: both those inside museums (museum management and staff, trustees, volunteers and committee members) and those outside museums, such as government and foundation staff and personnel in other agencies responsible for museums or grant-aid to them, designers and other museum service providers, and teachers and students in museum studies and related programmes. Our purpose is a practical one: to provide an easy-reference manual for the museum manager, including the director, president, and chief executive, for all those who are called on to perform management functions, including curators, department heads, project managers and team leaders, and for museum workers who wish to take management responsibility in the future. It is our hope that this book, and the case studies in it, will help to guide the way to still better museums in the 21st century.

Acknowledgements

This Manual has its origins in a certificate course on Museum Organisation and Management that the authors prepared over a decade ago for the Ontario Museum Association. The course has travelled with us over the years and has developed through seminars, courses and presentations we have made to museum professionals – including Museum Association seminars in London, the museum training programme at the *Niederoesterreichisches Landesakademie* in Austria, the Cultural Resources Management programme at the University of Victoria, and museum training seminars at the Urban Council Training School in Hong Kong and the Singapore Philatelic Museum. Our appreciation is extended to the many students and colleagues who continually challenged our thinking and stimulated us to develop the course and eventually this Manual.

This book reflects, too, our international experience in the management of museums, both directly and in our role as consultants to museum professionals and Trustees around the world. Our thanks go as well to all of our clients and colleagues for their creativity and professionalism in the hopes that this book reflects the best of their intention, as well as the measure of their accomplishment.

Special thanks are due to Nicholas Serota, Director of the Tate Gallery, for writing the foreword to this book; and to Damien Whitmore, Head of Communications at the Tate, who worked through the book with us from concept to conclusion. We wish to thank also the authors of the case studies, who are listed elsewhere in the book, for their lively and cogent contributions.

Colleagues and associates of Lord Cultural Resources Planning & Management around the world have also contributed to the book's development. In particular we would like to acknowledge the contributions of Cultural Building Consultant Murray Frost regarding technical details pertaining to accommodations; of Ted Silberberg who reviewed the chapter on museum finances; of Hugh Spencer who cast a practised eye on sections pertaining to exhibition development; of Heather Maximea who assisted with many of the technical glossary entries; of Louise Rowe who commented on the budget cycle; and of Kathleen Brown who focused on issues of museum leadership. Debbie Knight and Kevin Proulx of the Lord production staff are owed many thanks for their technical work with the manuscript in readying it for our publisher. Our thanks, also, to Lia Baschiribod for her dedication and care in handling the manuscript and arranging the book's launch.

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Finally, we wish to thank our daughter Beth and our son Ben for their patience during the writing and preparation of this book.

Gail Dexter Lord and Barry Lord

1 WHY

The Objectives of Museum Management

Almost everyone working in museums – including the directors – sometimes asks themselves: ‘Why do we need management anyway. . . What is it good for?’

Unfortunately, the answer is frequently unclear. Too often management merely makes bureaucratic demands on the time of museum professionals who could be providing the collection or the public with valuable services instead of attending another meeting, filling out a form or writing another report. Lack of leadership affects both staff and public when exhibitions lack creativity, education lacks focus or the collection is presented without vision.

What is ‘leadership’ . . . Why do museums need it?

Although entire books have been written on the theory and practice of management and leadership, we are going to risk defining both in one chapter. And, in the spirit of a manual, we will be building a comprehensive diagram of museum management to help readers sort, remember and apply key management terms.

1.1

The Purpose of Management

Contrary to popular belief, the purpose of management is to make it easier for the staff of the organisation to do their jobs by *facilitating decisions*.

To 'facilitate' means to make things easier than they would otherwise be:

The purpose of management in museums is to facilitate decisions that lead to the achievement of the museum's mission, the fulfilment of its mandate, and the realisation of the goals and objectives for all of its functions.



Figure 1.1 The Purpose of Management

This understanding of the purpose of museum management implies a very simple but effective means of *evaluation* of museum management:

Is the museum's management facilitating decisions that lead to the achievement of its mission, mandate, goals and objectives for all of its functions?

If so, management is doing its job. If not, changes are needed. And, since life is almost always a matter of degree, the quality of management may be evaluated by the extent to which it facilitates decisions that lead to the achievement of the museum's MISSION, MANDATE, GOALS and OBJECTIVES in fulfilment of the museum's functions.

Museums are not the buildings that house them, nor even the collections they protect – important as these are. Museums are complex cultural institutions uniquely concerned both with collecting and preserving the material cultural heritage, and at the same time *communicating its meaning* – whether that meaning arises from works of art, archaeological and historical artefacts or scientific specimens. The social and even political dimensions of the communication of meaning result in an institution that combines those aspects with the ‘hardware’ functions of housing and caring for a collection.

The purpose of a particular museum is expressed in terms of:

- mission
- mandate
- goals
- objectives

The MISSION STATEMENT of a cultural institution is an objective, brief and hopefully inspiring assertion of its *raison d'être* or relevance. It should answer the question, ‘Why should people care about this museum?’ The mission statement directs our sights toward the long-range reason for the museum’s existence. It is the foundation of all policy development. An example might be:

‘The mission of the County Museum is to preserve and communicate to residents and visitors the history and creative spirit of those who have lived here from the beginning of human habitation.’

The MANDATE of a cultural institution is the range of material culture for which it assumes responsibility. This may be stated in terms of:

- an academic discipline
- geographical range
- chronological range
- specialisation
- the relationships of the mandate to other institutions concerned with the same subject

An example of a mandate statement, which distinguishes our exemplar county museum from another institution, might be:

The mandate of the County Museum is the archaeology, history and both fine and decorative art of the inhabitants of what is now – County from the first human occupation of the area to the present day; the natural history of the county is the mandate of the University Museum, and will therefore be included in County Museum exhibits only to the extent necessary to support the human history displays.'

The mandate not only establishes the museum's mission in the objective world of public responsibilities, but also lays the foundation for the museum's relations with other institutions – governmental, educational and private sector, as well as with other museums.

The GOALS of a museum may be defined as the long-range, qualitative levels of collection development, collection care and visitor service towards which the institution is striving. They may be articulated for a given period of the museum's development in a strategic plan or master plan. Achieving them may take years.

By contrast, a museum's OBJECTIVES may be described as short-range, quantified expressions of particular steps on the way to the longer-range goals. Goals are placed on a timetable or schedule for fulfilment, and are usually specific to a one-year or two-year planning period. They may be articulated as part of a one-year plan of action, or as part of a budget exercise.

In defining its mission, mandate, goals and objectives, it is important for a museum to focus these on museum FUNCTIONS. There are six main museum functions that, taken together, define what is unique about museums. Three are related to the museum's assets, the other three to its activities (see Table 1.1).

Table 1.1 Museum Functions

Assets	Activities
Collecting	Research
Documentation	Display
Preservation	Interpretation

The seventh function, pulling the other six together, is ADMINISTRATION. The relationship between all seven may be visualised as a triangle, with the functions affecting assets grouped to one side, those representing activities along the other, and administration endeavouring to reconcile these two dimensions:

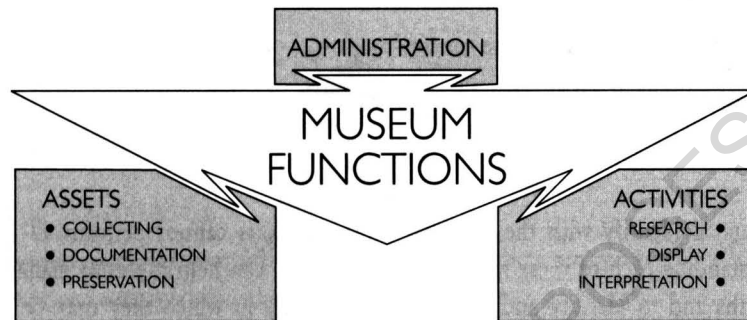


Figure 1.2 The Triangle of Museum Functions

The triangle is an appropriate image because (a) it is an inherently strong structural form, and (b) it points or suggests movement in a particular direction. Yet, at the same time, the inherent divergence of the two functions – assets-based and activity-related – is also made clear. The key role of administration in transforming this divergence into a creative rather than disabling tension is also indicated by the triangle. That role is described in section 1.3.

In order for museum management to facilitate the achievement of mission, mandate, goals and objectives, it must be adept at playing not one but five roles:

- TO INSPIRE with a sense of the museum's *mission*
- TO COMMUNICATE the museum's *mandate*
- TO LEAD towards the museum's *goals*
- TO CONTROL the attainment of *objectives*
- TO EVALUATE the fulfilment of museum *functions*

We can all identify with the fact that most managers cannot perform all five roles equally well. Yet understanding each of these roles in museum terms can help museum managers both to build on their strengths and to identify and strengthen those roles in which they may be weak. The diagram we are developing illustrates how these roles are mutually supportive.

1.3.1 TO INSPIRE WITH A SENSE OF MISSION

A former Director of the Corning Museum of Glass once told us: 'My mission is to get people excited about glass.' And because he was himself excited about glass, he was able to do so very well.

A good museum manager has a clear sense of the museum's mission, and inspires others to join in the fulfilment of that mission. This sense of mission is a well of creativity from which the manager derives original solutions to problems, redirects struggling staff towards the essential objectives, or sets challenges that lead the museum on to greater accomplishments. The manager's comprehension of the mission must be so infectious that people who meet him or her (from staff through volunteers and donors to visitors and the general public) want to get involved.

The manager must believe in the mission: it must matter emotionally, as well as intellectually, to him or her.

This role of management suggests a second criterion for the evaluation of museum management:

Does management inspire staff, volunteers, supporters, visitors and others with a sense of the museum's mission?

If inspiration is not forthcoming, it may be a weakness of management, or it may be that the mission is out of date, or has become irrelevant or less significant as we approach the 21st century. If this is the case, management should work with the museum's governing body to review and revise the mission statement. It is surprising how frequently trustees meeting to discuss the museum's mission discover