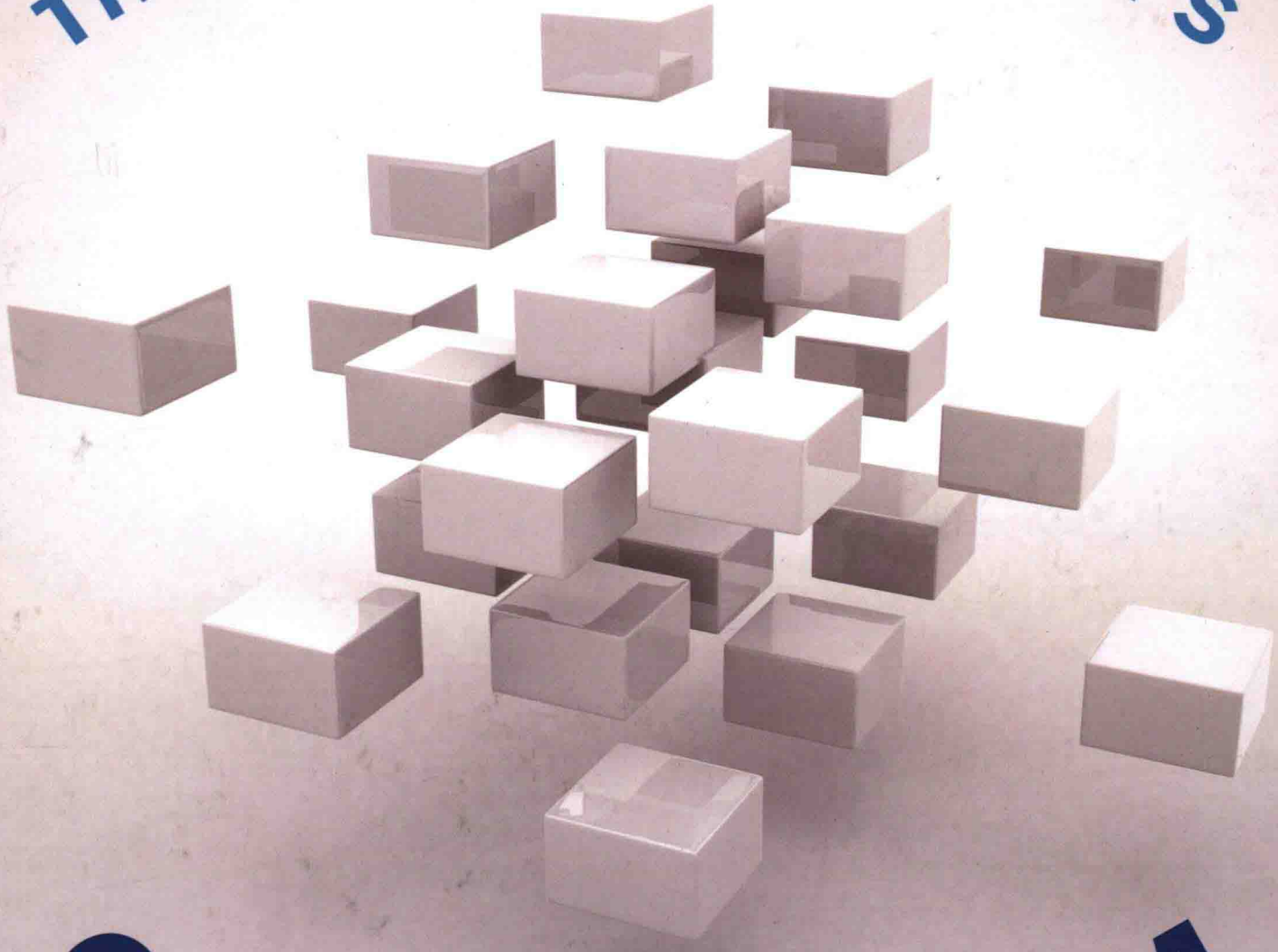
John W. Jacobsen

THE MUSEUM MANAGER'S COMPENDIUM



101 Essential Tools and Resources

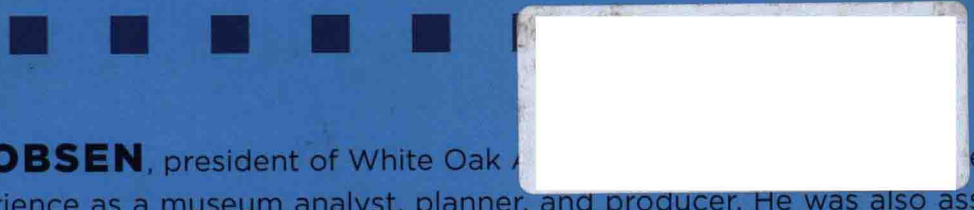
THE MUSEUM MANAGER'S COMPENDIUM: 101 ESSENTIAL TOOLS AND RESOURCES helps you make and implement your decisions as a museum manager and strategic planner. This book's 101 sections present a treasure trove of definitions, diagrams, processes, choices, and worksheets in major areas of museum management.

Collectively, these sections reflect the literature and contributions of some of the field's best thinkers. The resources distill half a century of museum experience over hundreds of projects done by scores of talents and experts internationally for all types of museums.

The Museum Manager's Compendium can be used as:

- a reference book to consult when facing decisions or planning for the future
- a source of examples and templates of common museum reports
- a source of answers and options for strategic planning questions
- a crib book to extract text when drafting internal proposals and plans
- a primer when welcoming new partners and board members
- a quick study and refresher of key aspects of museum practice
- an orientation to new staff
- a glossary for building shared definition among team members

The Museum Manager's Compendium is for museum professionals—leaders, managers, coordinators, professional counsel, contractors, evaluators, supporters, and policy makers—to use often. It is a must-own reference book for every museum professional responsible for decisions and implementation.



JOHN W. JACOBSEN, president of White Oak A ecades of international experience as a museum analyst, planner, and producer. He was also associate director of the Museum of Science in Boston. During that time, the museum served 2.2 million visitors during a twelve-month period, an unsurpassed record. Before that management position and since then, Jacobsen and White Oak have led strategic planning and marketing initiatives for more than one hundred museums through hundreds of commissions. Recent projects represent over a billion dollars of actual and anticipated investment in new and expanding museums internationally. White Oak's museum analysis and planning integrate impact and economic indicators with conceptual and creative planning.

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Jacobsen **THE MUSEUM MANAGER'S COMPENDIUM**

The Museum Manager's Compendium

101 Essential Tools and Resources

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Adaptation permissions have been given by Mary Jane Dodge (Marketing), Chuck Howarth (Discovery Centers), Bill Peters (Governance), Mark B. Peterson (Quality Visitor Experience), Richard Rabinowitz (Collection Use), Mac West (the Museum Experience), and Crystal Willie (Collection Policy).

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The Museum Manager's Compendium

ACCESS TO MIIP 1.0 AND THE MUSEUM THEORY OF ACTION

MIIP 1.0, an Excel database of 1,025 potential museum indicators of impact and performance drawn from fifty-one expert sources, was developed under the author's management by the White Oak Institute, a nonprofit museum research initiative. MIIP 1.0 and the Museum Theory of Action diagram are available to all for free independent of this book's publication. To access copies, go to http://www.whiteoakassoc.com/library.html.

The MIIP database is read-only so that the original version remains intact online; however, you can rename and save the file with your initials and go to work adapting it to your needs offline.

While access to MIIP 1.0 is free, you do not get any rights to the indicators, especially not commercial rights. You may need to obtain rights to use some of the indicators if you want to publish any source's collection of indicators. You should contact the sources directly.

This book is dedicated to White Oak's many clients and associates. Over four fruitful decades of collaboration, you researched and implemented innovative museum forms, community services, public components, analysis tools, and planning formats.

To our associates, you were always the best museum professionals we could find to add expertise to our planning teams. To our museum clients, you were visionary leaders, inspiring the best from our teams.

Both of you contributed the heart and soul of the resources in this book. All of us share our love of museums and gratitude for the great gift of riding the Museum Boom together. Thank you!

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Acknowledgments

The Museum Manager's Compendium: 101 Essential Tools and Resources draws from White Oak Associates' analysis, planning, and production work over four decades in the museum field. One of the joys of our projects has been collaborating with clients, associates, and colleagues. This collection of essential decision and planning resources is intellectually indebted to them.

The contributing authors provided important tools among the 101 resources, and I am first grateful to Victor A. Becker, Duane Kocik, and Jeanie Stahl for the sections they wrote and for their perspectives on the book as a whole. They are credited in their sections at the end of each introduction. Victor, White Oak's director of program development, wrote all the sections on his specialty—museum architecture, building, and site. Jeanie, vice president of White Oak, wrote all sections relating to museum finance, attendance, and market analysis and co-wrote operations sections with Duane, another longtime associate, who handled museum staffing and budgets. For decades, Jeanie, Victor, and Duane have provided their expertise and sound judgment to White Oak's planning, and I am beholden to their dedication and quality standards. Thank you for your active involvement in writing and shaping this book and for passing along your expertise to the future—and thank you for the friendship and support.

This book is indebted to many other White Oak associates who developed parts of our master plans that evolved over the years into many of these 101 tools and resources. Sections based on their planning work include those by Dave Chittenden (Education), Mary Jane Dodge (Marketing), Chuck Howarth (Discovery Centers), Bill Peters (Governance), Mark B. Peterson (Quality Visitor Experience), Richard Rabinowitz (Collection Use), Mac West (the Museum Experience), and Crystal Willie (Collection Policy).

In our wonderfully collaborative field, many collegial friendships have shaped my thinking. Some colleagues' ideas appear directly in this book, including Minda Borun (Family Learning), David Ellis (Branding), John Falk and Lynn Dierking (The Museum Experience, Identity), George Hein (Theories of Knowledge and Learning), Pelle Persson (Use of Key Performance Indicators), and Roy Shafer and Mary Sellers (Core Ideology).

Other articulate museum writers and thinkers have influenced my thinking and informed White Oak's museum analysis and planning. I have learned from all who write and speak out thoughtfully about museum purposes and values, and I am particularly grateful to those who have personally commented on my evolving thinking. White Oak's other team members and clients have also shaped this framework over decades and over hundreds of museum analysis and planning projects. One of the many pleasures of this work is to collaborate with great minds and museum leaders, including all those mentioned above plus Tom Aageson, Phil Aldrich, Joe Ansel, Ted Ansbacher, Ron Baillie, Gail Becker, Ford Bell, Jaime Bell, Larry Bell, Kate Bennett, Chuck Bentz, Andre Bilodeau, Ann Bitter, Bill Booth, Carol Bossert, Lois Brynes, Lou Casagrande, Kim Cavendish, Chris Chadbourne, Lisa Collins, Rich Conti, Mickey Culver, Tim Curnen, Mike Day, Al DeSena, Anne D. Emerson, Claude Faubert, Mike Fawcett, Chad Floyd, Ron Forman, John Fraser, Sarah George, Peter Giles, Norm Glouberman, Sheila Grinell, Elaine Gurian, Jo Haas, Alf Hatton, Marilyn Hoyt, Kim Hunter, James Hyder, Bob Janes, Linda K. Johnson, Lynda Kaplan, Phil Katz, Jeff Kennedy, Jeff Kirsch, Al Klyberg, Emlyn Koster, Eli Kuslansky, Peter Kuttner, Wayne LaBar, Ed Lantz, Betsy Leichliter, Peter Linett, Greg MacGillivray, John Mackay, Mary Maher, Art Manask, Ian McLennan, Toby Mensforth, Beth Merritt, Ann Mintz, Joe Moore, George Moynihan, David Mugar, Mary Ellen Munley, Al Najar, Tengku Nasariah, Freda Nicholson, Wit Ostrenko, Berred Ouellette, Jim Peterson, Wendy Pollock, Gigi Priebe, Fern Proulx, Barbara Punt, Christine Reich, Janet Rice Elman, Steve Rich, Jim Richerson, Laura B. Roberts, Brent Robinson, Steve Rosen, Christine Ruffo, Madlyn Runburg, Bob Russell, Moshe Safdie, Jean Saint-Cyr, Dennis Schatz, Kate Schureman, Carol

Scott, Marsha Semmel, Beverly Sheppard, Eric Siegel, Nina Simon, Mary Davis Smart, George Smith, Jack Spoehr, Mark St. John, Peter Sterling, Martin Storksdieck, Sarah Sutton, Charlie Trautmann, Bonnie VanDorn, Jeanne Vergeront, Sandy Welch, Tim Willis, Dennis Wint, Joseph Wisne, and Elizabeth Wylie.

I caught my love for museums from four museum mentors who may be gone but certainly are not forgotten: Roger Nichols, the director of the Museum of Science and my boss during one of the Museum's most vibrant and successful eras; Roy Shafer, the museum director who went on to coach museums to develop their "conceptual frameworks"; Alan Friedman, the committed museum educator who led by the example of his principled character and brilliance; and Stephen Weil, whose writings underlie all contemporary assumptions about museums and their value and whose thinking weaves throughout this book.

Thank you, colleagues—your guidance and insight were very helpful. Thanks also to Charles Harmon, Kathleen O'Brien, and Elaine McGarraugh for their editorial and publication support.

Special acknowledgments go to Karen Hefler of White Oak Associates for her painstaking dedication to producing the manuscript and its tables and worksheets, to Rebecca Robison for her patient assembly of these materials, and to my partner in everything, Jeanie Stahl, for her guidance and support.

Preface

WHY THIS BOOK? WHY NOW?

What have we learned over the past half a century? What resources has the museum field developed to help you, as a fellow museum manager, make and implement decisions? How do you get hold of those resources?

In the past 50 years, the museum field has more than doubled internationally, increased per capita visits, formed museum associations, founded affinity groups, published shelves of books, launched museum studies programs, established standards, convened conferences at all scales and geographies, and accumulated volumes of data. We have advanced museums.

Yet we have to document, communicate, and share those advances before the museum field can share widely used metrics and standards as do more mature professions. We need to manage museums informed by what we have learned over the past half a century and inspired by what we can add to the future.

This book, The *Museum Manager's Compendium: 101 Essential Resources and Tools*, begins to address that lack. The 101 sections present definitions, processes, menus, samples, and categories in major areas of museum management. Collectively, they reflect the literature and contributions of some of the field's best thinkers as well as the authors' decades of experience developing and using these field-tested resources.

The U.S. Museum Boom, from the early 1980s to 2008, was an explosion of new forms of museums fueled by the investment of billions of dollars in museum expansions and new facilities. For the museum planners, architects, designers, and managers lucky enough to ride the wave, it was like being a painter in Paris during the Belle Époque or a writer in Boston in the 1840s.

Add to this activity and cash flow the collaborative nature of museum colleagues, and we had the perfect conditions for rapid evolution and creative progress. Museum professionals collaborated globally during the Museum Boom, exchanging ideas and sharing innovations. Together, we invented advances for museums that moved the field forward: new services, new audiences, and new methods; new materials and new standards; new ways of thinking and evaluating; new choices; new impacts and new benefits; and, of course, new kinds of museums.

This book has the collected and distilled resources that our team at White Oak Associates developed over decades of projects with scores of talents and experts internationally.

HOW TO USE THIS BOOK

How does your museum make decisions? Strategically or opportunistically? Thoughtfully or intuitively? Informed by data or by road savvy? And how do *you* make decisions?

The *Museum Manager's Compendium* will help you and your museum make and implement decisions. The book contains 101 resources covering many aspects of museum practice, organized alphabetically so that you can find them easily. The index and the list of tables are also helpful, along with the cross-references in the text. The 101 resources include the following:

Descriptions, briefings, and theories
Menus of the main options in key areas
Diagrams and planning templates
Bibliography for citations and references
Implementation processes
Planning worksheets
Checklists and reminders
Floor plans and adjacency diagrams
Data tables and statistical charts
Calculations, formulas, and key performance indicators
Categories and frameworks
Policy drafts
Concepts and strategies
Definitions
Budgets and financial reports
Decision templates
Examples from sample museums
Ways of thinking about complex issues

This is a reference book to use, not a narrative to read cover to cover. You can adapt the text and images to your museum's context (search and replace "museum" and "XX"). Italic text is addressed to you as helpful hints, use instructions, cross-references, and authorship. Some sections can be read as briefings on a topic. For example, if you want Falk and Dierking's Museum Experience Model, you will find it in "33. Education: Learning Theory" with their diagram, a page or two of explanation, and two blank worksheets for you to think about your visitors' personal and sociocultural contexts. Or if you need to write a request for proposals to select an exhibit designer, you can adapt the steps outlined in "1. Architect Search Process" and add selected specifications from "98. Visitor Experience: Concepts." Or you can browse through the 101 sections for new ideas and insights. You can adapt any diagrams or text for internal use to share with board members, partners, contractors, and staff.

With the exception of the sections covering definitions, most resources start with an introduction that summarizes what is in the resource and how to use it. Some sections end with open planning worksheets for you to try out different scenarios. All citation references are in "15. Bibliography for Museums."

Several sections are menus of possible choices that a museum might consider. The descriptions and outlines can be adapted to insert into preliminary concept designs and cost estimates. Others are processes that can be adapted into scopes of work for staff and contractors.

Most of these descriptions are written in "future positive," that is, that your museum will have [the following text]. These blocks of text in future positive are meant to be inserted into a plan for the future, describing what the future museum will be like after it is finished and open to the public. Consider the following example of a planning plank that you might adapt into your museum's future programming plan:

"Each Family Sunday will be cosponsored by a different community organization (the police, the Elks, the local hospitals, etc.) in return for getting their messages out and the chance to do some fund-raising."

If the gist of this seems right, you should ask the following questions as you adapt it:

1. Should we call it "Family Sunday"?
2. Do we have Elks? And are there better, more local examples?
3. Does our museum policy permit others to raise money on-site?
4. How do we make sure their message aligns with the museum's brand?
5. Is the verb tense right? Instead of *will*, should we use *could* or *might*?

Of course, this book is not complete. Neither the 101 sections nor the individual menus claim to be comprehensive. The systems of categories, on the other hand, are intended to cover their full territory; while you may imagine a new category, chances are good that it will fall underneath or within one of the larger fields.

HOW CAN THIS BOOK HELP ME?

You can use *The Museum Manager's Compendium* in many ways:

- As a frequent reference book to consult when facing decisions or planning for the future
- As a source of images, choices, and diagrams to use in presentations and discussions
- As a crib book to extract text when drafting internal proposals and plans
- As a primer when welcoming new partners and board members
- As a quick study and refresher of key aspects of museum practice
- As an orientation to new staff
- As a source of examples and templates of common museum reports
- As a source of answers to strategic planning questions, such as these:
  - What is the big picture of the museum field as a whole?
  - How do we find out what our community needs are?
  - How do we relate to our audiences and supporters?
  - Why do we exist? Which purposes are most important?
  - What observable and measurable impacts should result from our actions?
  - What do we have? What are our holdings and strengths?
  - How should we think about, use, and care for collections?
  - What components might interest potential funders?
  - How should we approach architecture?
  - Do we have resources that could be generating greater returns in impact or income?
  - What long-term infrastructure do we need to operate efficiently and effectively?
  - How can we think about programming the museum? What are our daily, weekly, monthly, and yearly offerings?
  - How do we select the best programs to feature?
  - Can we get more use from some of our spaces and resources?
  - How might we organize our staff? What benefits might we offer?
  - How do we budget?
  - What should we charge to whom and for what?
  - What is our peak capacity? How many cars is that?
  - How do we strategize marketing and membership?
  - What benefits do audiences want?
  - How do we evidence changes in our impact, performance, and value?
  - What is our market? What are its size and character?
  - What is our potential attendance?
  - How are we doing compared to our peers?
  - What public spaces do we have? How easy is it to change their content?
  - How do we organize and schedule a capital project?
  - What are typical capital project implementation phases and benchmarks?
  - How do we plan an operationally effective and efficient building?
  - How do we tell architects what we want?
  - How do we budget a project? What categories of costs should we consider?

BACKGROUND

This book is the conclusion of a logical sequence for this museum professional, who was lucky enough to be aboard for the Museum Boom. Many years and steps led to this book:

1. Almost 50 years of experience with hundreds of museum analysis and master planning commissions in many disciplines and sizes helped me understand what was different and what was common among diverse museums. This experience also deepened my love of museums for their rich variety and honorable values.
2. In 2009, I challenged museum managers and museum evaluators to work together to find a way to evaluate museums as whole institutions in "A Research Vision for Museums," my address at the annual CARE luncheon of the American Association of Museums, later published in *Curator* (Jacobsen, 2010b).
3. In 2014, I wrote "The Community Service Museum: Owning Up to Our Multiple Missions." This academic article made the case that many museums were contributing additional values beyond their stated missions and were operating as multimission museums. It was published in the peer-reviewed *Journal of Museum Management and Curatorship* (Jacobsen, 2014).
4. In 2016, I brought together years of researching indicators and their use with my study of evaluation frameworks in *Measuring Museum Impact and Performance: Theory and Practice*, published by Rowman & Littlefield. This book developed a taxonomy

of impacts, a glossary of terms, and a shared museum theory of action, along with ways museums can use them to self-evaluate (Jacobsen, 2016).

5. In 2017, with the help of colleagues, I assembled *The Museum Manager's Compendium: 101 Essential Resources and Tools*, the book you are reading. This process filtered our almost five decades of learning through the aspirations and frameworks developed in the sequence of publications into a consistent view of museum management aligned to the taxonomy, glossary, and theory of action (Jacobsen, 2017).

CAVEATS AND CAUTIONS

This book and its 101 resources are protected by copyright. In some cases, work by others is further protected by the original authors and is used here with their permission. Nothing in this book may be reproduced for public or commercial use without the author's permission. However, everything in this book may be copied or adapted for *internal* use within a museum or museum service organization.

The numbers used in the tables are only to illustrate the mathematics and formulas among the columns. *Do not use* these numbers in your assumptions; rather, research and develop your own numbers, particularly dollar and population numbers, which will change from these samples. Some tables reflect judgment calls; those are for illustration only and are not to be applied to your context and time. These are sample judgment calls, and the authors make no assertion that they are the right call for your museum.

These sample frameworks and templates are intended to be adapted by individual museums and modified to their contexts, as policies and procedures may vary based on state laws, museum size and sector, organizational culture, and other factors. The frameworks in this book should not be considered legal or accounting advice and do not reflect state laws and regulations. Any use of these frameworks should be reviewed by legal and/or accounting counsel for compliance with local laws and regulations.

Some resources were developed for or are particularly apt for science-oriented museums, such as science centers, natural history museums, zoos, and some children's museums. In most cases, these discipline references can be adapted to history, art, and culture museums.

CONCLUSION

You hold the distillation of half a century of museum experience. I hope it is helpful in making and implementing your decisions as a museum manager and in strategic planning. However, we need to continue advancing the museum field. As you read and use this book, your job is to improve and add to these resources, with humility and respect for the work of your colleagues in the past.

Now, step back from the fray for a moment to imagine your ideal museum. Look to the future. What will success look like in 10 years? This book helps you make key policy choices about where you want to go. Once you know that, you can lead the way out of the fray.

See "15. Bibliography for Museums" for citation references.

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