

# INDEX

<b>1. The Pathways of Innovation: Preliminary Remarks</b>	<b>4</b>
<i>Luca Dal Pozzolo</i>	
<b>1.1 The Research Project</b>	<b>5</b>
<i>Luca Dal Pozzolo</i>	
<i>Research objectives</i>	5
<i>Definition of the research field and methodological indications</i>	6
<i>Operational structure of the research</i>	10
<b>1.2 Case Studies</b>	<b>12</b>
<b>Archäologischer Park Carnuntum Betriebsgesellschaft m.b.H</b>	13
<i>Raymund Kastler</i>	
<b>Ars Aevi Project</b>	17
<i>Valeria Beolchini</i>	
<b>Castello di Rivoli. Museo d'Arte Contemporanea</b>	20
<i>Alessia Rossi</i>	
<b>Schönbrunn Castle</b>	24
<i>Monika Horny</i>	
<b>Royal Castle in Warsaw</b>	29
<i>Agata Wasowska Pawlik</i>	
<b>Croydon Museum</b>	30
<i>Judi Caton</i>	
<b>Deutsches Museum München</b>	36
<i>Raymund Kastler</i>	
<b>Dutch Digital Heritage Association (DEN)</b>	44
<i>Judi Caton</i>	
<b>Heritage Island</b>	47
<i>Giovanni Festa Bianchet</i>	
<b>Museo Nazionale della Scienza e della Tecnica Leonardo da Vinci</b>	52
<i>Giovanni Festa Bianchet</i>	
<b>Museu d'Arqueologia de Catalunya. Empúries</b>	56
<i>Valeria Beolchini</i>	
<b>MuSiS</b>	60
<i>Monika Horny</i>	

<b>The Ragged School Museum</b>	65
<i>Judi Caton</i>	
<b>Sheffield Galleries &amp; Museums Trust</b>	71
<i>Judi Caton</i>	
<b>Sistema Museale Umbro</b>	77
<i>Giovanni Festa Bianchet</i>	
<b>SKOZK (Spoleczny Komitet Odnowy Zabytków Krakowa)</b>	82
<i>Agata Wasowska Pawlik</i>	
<b>Wohl &amp; Sein - Being and Wellbeing</b>	83
<i>Saskia Klassen</i>	
<b>Zeppelin-Museum Friedrichshafen GmbH.</b>	85
<i>Raymund Kastler</i>	
<b>1.3 The Pathways of Innovation: Itineraries and Directions for Travellers</b>	<b>89</b>
<i>Luca Dal Pozzolo</i>	
<i>Itinerary 1: Crisis as an instrument of innovation</i>	89
<i>Itinerary 2: From the Object to the Subject</i>	90
<i>Itinerary 3: From Still Life to Live Performance</i>	90
<i>Itinerary 4: Conservation versus Use - Negotiating the Equilibrium</i>	91
<i>Itinerary 5: From Ivory Tower to Network</i>	91
<i>Remarks about the Five Itineraries</i>	92
<b>2. The Seminar</b>	<b>93</b>
<b>2.1 The Programme</b>	<b>94</b>
<b>2.2 Introductory Reports</b>	<b>98</b>
<b>Interaction, Cooperation, Partnership</b>	<b>99</b>
<i>Raymund Kastler</i>	
<b>Institutional engineering</b>	<b>105</b>
<i>Ugo Bacchella</i>	
<b>Policies towards the Public</b>	<b>109</b>
<i>Judi Caton</i>	
<b>Policies Towards Staff</b>	<b>113</b>
<i>Mark Hilton</i>	

<b>2.3 Reports from the workshops</b>	<b>117</b>
<b>Interaction, Co-operation, Partnership</b>	<b>118</b>
<i>Danielle Cliche</i>	
<b>Institutional Engineering</b>	<b>122</b>
<i>Christopher Gordon</i>	
<b>Policies towards the Public</b>	<b>124</b>
<i>Lidia Varbanova</i>	
<b>Round Table: How can training institutions meet the news trends and challenges?</b>	<b>127</b>
<i>Isabelle Schwarz</i>	

# **The Pathways of Innovation: Preliminary Remarks**

Luca Dal Pozzolo

This document represents the first stage of a process of research. It therefore does not mark the final destination of an itinerary, but instead opens up and introduces a series of issues which will be dealt with at the seminar to be held in Turin on November 4 - 6. Primary attention will be made to the collection of case studies presented and to the consequences which have been brought about by innovative forms of management in the field of cultural patrimony. Such consequences can be seen not only in the organisational structure of single institutions, but above all, in training programmes reflecting the professional skills and competencies necessary for the management of the cultural patrimony today. Thus, the presentation constitutes a platform for discussion and not a list of innovations in management in the sector of cultural patrimony in Europe. The objective limits of investigation in this field were already made clear in the draft of the original research project. Efforts were concentrated on gathering significant case studies in order to provide evidence for the various pathways being explored by management. There was never any intention to completely reconstruct the entire panorama of innovations: that would have been much too ambitious a goal for a pilot project.

Now that the completed case studies have been compiled, it seems much more useful and interesting to attach a copy of the initial research project rather than to restate the objectives of the research and the predicted results. The attached project thus serves as evidence of the process of research as well as an introduction to the case studies, and seems to be the clearest means of describing the goal of the research as well as the means and perspective adopted. Readers can judge for themselves to what extent the initial goals of the research have been met and whether or not the descriptions of the museum and institutional activities offer insight into the difficult task of defining the meaning of innovation; they may also wish to reflect upon the extent to which the task itself forms a meaningful basis for discussion.

The case studies are followed by a final chapter, which is organised according to a number of "pathways" of innovation. This is a reflection on the paths which seem to emerge from comparative analysis of the various experiences described, and intends to offer further material for discussion within the seminar. We have tried to identify connections between the general schemes, results and evidence, which lead to the definition of a number of possible itineraries on the basis of the material gathered. To what extent this is an indication of current or nascent trends is subject to debate and is not the outcome of research.

# **The Research Project**

Luca Dal Pozzolo

## **Research objectives**

The research within the MIMEH project is a preparatory and preliminary activity for the seminar devoted to training issues and the new professional profiles required by the management of the European artistic and cultural heritage. As a consequence, the search for innovative management models is useful to “launch” the fundamental topics of the seminar as well as to create the framework, which will be assessed and discussed during the seminar.

In other words, this means gathering an adequate number of case studies, which describe the main innovative trends of the management applied to the European artistic and cultural heritage. At the same time, it means identifying the specific features and the common traits with regard to the tools used, the professional competencies involved and the training needs.

The main objective of the research is to highlight the specific differences of each case as well as to find the comparability criteria and the basic elements, which are common to the various experiences. The reason for the twofold objective is to be found in the dissemination of the final results both of the research and of the seminar.

Firstly, there is the need to inform, to disseminate specific experiences that may be assessed and considered by operators working in different field and in various countries. Having different examples and case studies is a resource in itself and may enable the application and use of innovative tools or procedures in other geographical and thematic contexts. The difference is a requisite for a “cross-fertilization” of the managerial approaches.

Secondly, we should identify the requirements of the management of the European artistic and cultural heritage in terms of professional competencies, training needs and, more in general, with regard to the basic conditions necessary to develop and implement innovative management models. Due to the attention focused on training issues, the analysis moves from the specific case to the inter-specific comparability. In fact, it is not just a question of identifying one or two extremely qualified professional profiles that can be used in a specific institution. It means understanding whether there are the essential requisites necessary for the development of a new management, so that the new professionals can carry out different tasks, included the hyper-specialized functions.

## Definition of the research field and methodological indications

The time constraints and the economic restrictions of the research, as well as the European dimension of the project, imply a clear definition of the research field. This presumes a series of “a priori” choices that must be explicit. The following criteria, agreed by the project partners have to be used in an integrated way, in order to define the research field.

### 1) Innovative models and innovation: a possible definition of the meaning

One of the most difficult obstacles to overcome is the identification of all what is included in the idea of “innovation” and “innovative model”. We will try here to identify at least an “area of possible meanings”, to be used as a reference, knowing, however, that the borders of this area are extremely difficult to identify, in fact they are quite vague. Nevertheless, from an empirical and pragmatic point of view, it seems to be important to share at least the main concepts, postponing the definition of the border areas to a debate on each single case.

Our proposal is to consider innovation and innovative model in managerial terms, as “a certain kind of answer” given by an institution, a system or an individual, to a “pressure” urging to change. This pressure may come from the outside or from within the institution itself, or it could be due to the interaction between the outside and the inside. “A certain kind of answer” means that:

- ◆ The “pressure”, be it internal or external, is analysed and considered as a problem that has to be tackled from the operational viewpoint as well as from the perspective of the concept.
- ◆ The tools and the logic used to face such a pressure are the result of a project-based effort, which has an impact on the normal activity of the institution or the individual.

With a simplistic definition, innovation could be considered as a set of elements, such as the tools, the procedures and the logic, that can be used to escape a “cul-de-sac”-like situation.

- ◆ By means of a change of the paradigm, i.e. by changing the definition of the problem, thus turning the constraints into resources.
- ◆ By means of new resources, new functions, new professional competencies.
- ◆ By means of the adoption of new tools.

There must be a certain interaction between these elements, if we want to talk about innovation or innovative model. The new elements must somehow send a feedback to the structure of the system and must not simply become additional elements. Opening a marketing office within a museum, an office that would organise a mailing list and a series of promotional initiatives, may not be an innovation in itself, unless it tackles the question of the relations between the museum and the various types of visitors and the possible types of communication.

As a consequence, this “certain kind of answer” can be an innovation if it contains strong creative elements and if it has a certain “weight” on all or some of the activities carried out by the individual. All this said, it should now be quite clear the difference between good management, “good administration”, managerial efficiency and innovation.

If the previous information may be helpful to define some meanings of the word innovation, we must not forget, however, that we have analysed things from the point of view of the individual (innovation “for” that person). In fact, the passage from the specific case to the “general” concept of innovation implies further complications. The very same concept of innovation is relational and refers to a precise context, i.e. we always innovate with reference to something or to someone. The concept of innovation would lose any meaning if considered

without a context and in the abstract. Obviously, what is strongly innovative in a context may not have the same meaning in another, or it may be considered as an acquired and ordinary element. Considering that we have to take Europe as a reference context, which involves a series of extremely different geographical, cultural and legislative situations, we may find a possible way out by identifying some prerequisites:

- ◆ The innovative elements of the case studies should also be applicable to different geopolitical contexts. They should use “translatable” operating tools, that is to say that the innovation should not just refer to, for example, the interpretation of a specific and unrepeatable condition.
- ◆ The innovative elements should be applicable to the artistic and cultural heritage even in different sub-sectors. This means innovations that do not refer only to a specific object (i.e. only for scientific museums and only for the restoration of military architecture of the 18<sup>th</sup> century and so on).
- ◆ The innovative elements should refer to basic concepts, to a managerial culture, to a project-related logic that can be useful and productive for other sub-sectors or other geographical contexts, even though the adopted operating tools may not be directly “transplanted or exported”.

The existence of at least one of the above mentioned conditions might be the first empirical criterion for the definition of the case studies.

## 2) Comparability, representativeness, exemplarity

On the basis of the previous statements, we can say that the research analyses first of all the innovative features of the management of the artistic and cultural heritage and not the managerial “model” as a whole.

Here we propose to consider the opposite situation: The definition of different “models” and different types of management is the result of the research and of the processing of information and not an “a priori” discriminating hypothesis.

This does not imply that we will compare the various managerial models, however, there should be at least a comparison between the innovative elements of the management of the artistic and cultural heritage.

Every comparison should be preceded by a precise description of the specific features of the case under examination. This would highlight the conditions and the context, which show innovative elements that should then be compared with other cases (the innovation itself, before the comparison with other innovations).

At first, the levels the comparison should be focused on, can be defined as follows:

- ◆ The entrepreneurial logic, the cultural attitudes, the economic resources which enable the development of innovative elements in the management.
- ◆ The decision-making processes, the human resources, the competencies, the professional competencies and the training needs necessary for a practical effectiveness of the innovative management.
- ◆ Methods and tools adopted.

We propose here neither a direct comparison between different cases (as the weight of the specificity would make it a very hard task) nor a comparison on the basis of sub-sectors (the scientific museums, the art museums, historical buildings etc.). In the hypothesis proposed here, the questions that should be given an answer in the first place do not refer to the needs of each single sector (the interactivity for art museums, the teaching activity for scientific museum, the definition of the relations with the context for the monuments and so forth). We must identify the

professional competencies, the training paths, with reference to operating strategies and managerial processes, which are considered interesting, thanks to their innovative features and their operating possibilities.

Some of the key questions could be formulated as follows:

- ◆ “Is there a core of basic competencies, core skills and survival skills, that are indispensable for the management of the heritage the cultural and economic challenges of the various Europeans contexts?”
- ◆ “Does the complexity of the emerging problems require a specialized training, with a major role played by specific techniques and tools used during the learning process, or is it necessary to create competencies and professional competencies that can adapt and learn according to the situation?”
- ◆ How does the managerial capacity in the administration of the heritage contribute to the definition of a “new” cultural project?

The above mentioned questions are a simple indication and can be used to identify some of the topics and the level of the subjects that could be defined in a more precise way thanks to the comparison between the different case studies.

We thus propose a cross-comparison between the various types of arts and culture (museums, archaeological sites, monuments, landscapes and so forth).

It could be divided into four main topic-related categories, in which the innovative elements could be compared and assessed:

#### A) Interaction, co-operation, partnership

The institution, the body or the individual tries to react to a certain “pressure” by showing its readiness towards the co-operation with other bodies, the creation of a systematic collaboration, the participation in a network of institutions and other individuals. From the arts and culture becoming part of tourist and thematic itineraries, to the co-ordination on the basis of policies aiming to the urban revitalization. It is not just a question of taking part in tourist promotion policies. It all refers, for instance, to the museums whose exhibition spaces are supplied by local producers or local economies. One typical example is the case of some museums of science and technology or some Science Centres.

More in general, the managerial attitude, in this case, combines the need for a specific management of a specific monument or institution, with an active interest within system-related strategies and economies, sharing the external aspects deriving from the fact that many actors are operating together.

It is quite interesting the case of cultural institutions seen as leading elements (for example the promotion of the city centre focused on a particular monument or museum). And it is equally interesting the case of arts and culture seen as elements within a network, where they do not play the central role (for instance some tours focused on gastronomic tourism or other things).

#### B) Institutional engineering

Some strategies for the development of arts and culture may be started up by the combination of public and private resources, whether they are economic, human or other resources. This combination is possible thanks to a different institutional structure and the co-operation/competition of various subjects. The safeguard, the management, the control, the enhancement of the value, the financing and the ownership are all functions that must not necessarily depend on one single public institution. The development of bodies and the creation of the “third sector” in



the whole of Europe, give rise to a series of experiments with new institutional models that include subjects having a different legal nature and different missions. There is the example of the Dutch experiment, focused on the privatisation of the museums' management, in which the public maintains the ownership and the control. And there is the case of the participation-based foundations in Italy, which have one institutional aim and involve public bodies, church bodies, private companies, professionals, with different contributions and roles for everyone of them.

C) The policies towards the public

Starting from the concept of marketing, though this is not the only element taken into account, a new way of considering communication with the potential publics is getting a foothold. It involves the very same structure of the museum collections and the way of exhibiting and communicating the meanings “around” the arts and culture. The idea is that one cannot talk about “a public”, but that there are different types of public and they all use different communication codes. The increasing availability of arts and culture gives rise to a problem of intercultural mediation between groups of people, not simply those coming from different cultures and nations, but also those belonging to the same country, albeit with different cultural levels or with different access and communication possibilities. The same kind of problem is to be found in teaching activities and in the use of interactive and multimedia tools.

The different types of relation and communication with the public propose some considerations that may involve the administration, the structures, the meanings and the criteria followed for the exhibition and the availability of arts and culture.

D) The policy toward the staff.

The above mentioned items may have strong interactions and effects on human resources management. Facing the problem of intercultural mediation may require strict co-operation among Curators, Marketing Managers, Researchers, as well as a change in institutional structure may require, new skills, roles and functions within a new organisational model.

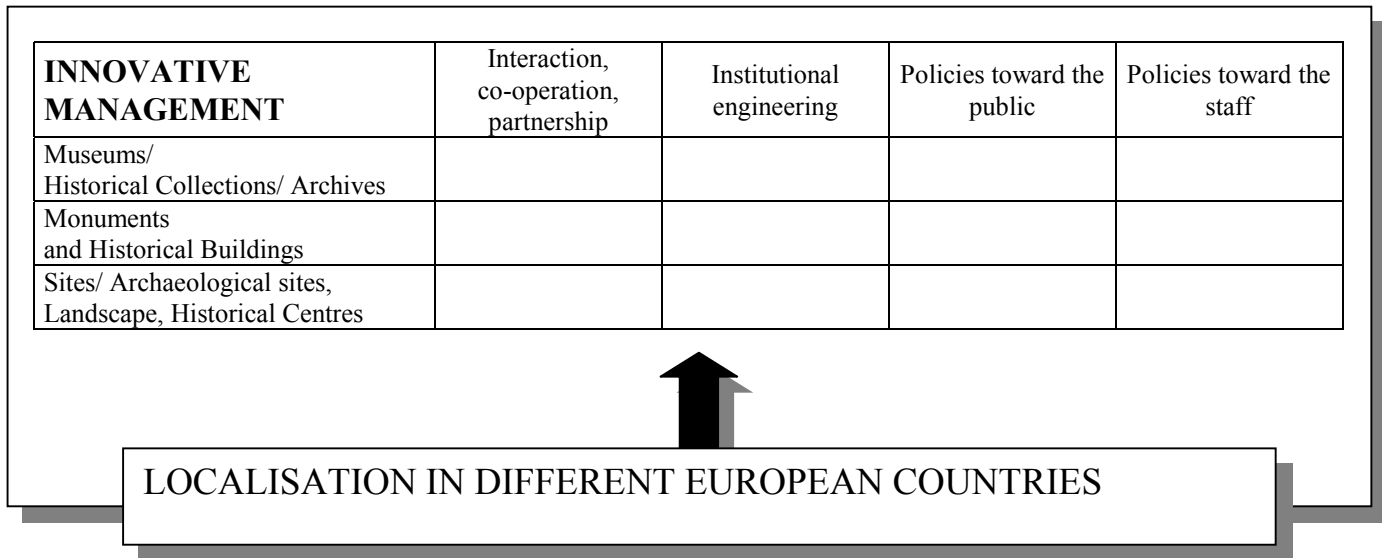
Anyway, policies toward the staff could not only be the consequence of changes in different sectors and activities of the Institution, but they may be a pre-requisite to gather higher level in services' quality, or to co-operate and interact with other institutions and social actors.

Last but not least, in a certain number of examples, the “deep spring” of the innovation process could be found in a particular way of interaction within a team.

If these four fields, or their interaction, can be considered the main sectors in which we should look for innovative elements, then it is essential that the case studies be chosen as examples within each one of the thematic fields. The final list of the case studies to be analysed, will have to take into account the different problems and difficulties in each thematic field, the various approaches, linked to a variety of positions, as well as the problems relevant to the numerous nationalities and geographical areas.

All case studies should then represent the different trends within each thematic area. Of course, they could not represent an important sample of experiences for each European country or an important sample of the innovations in each sub-sector relevant to arts and culture (the art museums, the science centres, the policy for the restoration of the old town centres and so forth). The diversity of the museums and of the cultural and artistic institutions considered is certainly going to enrich the research. However, the analysis aims to find elements to compare in the thematic fields defined above and not in the specific typologies characterising arts and culture that are homogeneous with one another.

Anyway the different criteria in choosing the case studies to analyse can be summarised in a multi-criteria grid (see- below) useful to find a balance among the cases related to innovation in the four above mentioned managerial fields, the cases of innovation in different “typologies” of heritage and institutions, the cases of innovation in different European countries



## Operational structure of the research

Considering the constraints of the MIMESH project, it seems important to carry out a precise selection of the case studies that are to be carefully analysed.

So, once identified the selection criteria, it is necessary to make a list of the cases (on a national basis or based on groups of nations). The list should be made with the help of privileged witnesses for each area including Universities, Public Institutions, Research and Documentation Centres, European networks active in the sector of arts and culture .

The cases **will** then be classified, in order to highlight the consistency with the adopted criteria. This ought to be done by means of a “lean” method (i.e. not more than half a typewritten page), so as to underline the object of the analysis and the reasons that justify the interest. All files that have thus been prepared, should enable the research group to take joint decisions on the cases that have to be studies, combining the geographical location with the interest for the topic and the typology of the artistic and cultural works involved.

It means empirically carrying out a selection on the basis of the above mentioned multi-criteria grid. Anyway, as already stated, it seems to be impossible to have a selection aiming at a sample-based representativeness. However, this implies that the criteria, disregard their being arbitrary, are explicit and must be communicated during the results dissemination phase. It is not intended as a complete picture of the trends of the European management of the cultural heritage. It simply is a first set of examples and trends characterized by some innovative features and by the fact that they suggest some questions relevant to the training in the world of culture.

The objective is the identification of at least 20 and not more than 30 cases to analyse.

For the latter we envisage a questionnaire (the questionnaires will have to be different for the four thematic fields previously identified) which aims to obtain a homogeneous and basic level of information: from personal data to the fundamental characteristics of the innovative elements. Furthermore, considering the obvious inadequacy of a questionnaire, which cannot account for all managerial innovations, we will ask to send back-up material, work reports, surveys and other assessment material, in order to better analyse the identified topics.

All the material will then have to be summarised by the researchers on a file, three or four pages on the whole, which gives an outline of the survey carried out on a single case.

The files will be included in the final dossier and will be enclosed to a report highlighting the topics common to the single case studies, according to the comparative methods previously indicated in the methodological information.

## **Case Studies**

# **Archäologischer Park Carnuntum Betriebsgesellschaft m.b.H.**

## **Raymund Kastler**

### **Innovative key-points:**

- visitor orientated marketing of archaeological remains;
- thematic guided tours through the ancient ruins;
- seasonal events accompanying the presentation of the ancient ruins;
- projected installation of TQM

As pointed out The APKplc is one of three cultural heritage management institutions on a private base in Austria

Since most of the archaeological parks are operated by the public, being private based means a greater flexibility in terms of working hours

As some other case studies illustrate the model of a private based management and a public based scientific branch can function very fruitfully and can be employed on different types of cultural heritage institutions

### **Short description:**

The area of the two villages Petronell - Carnuntum and Bad Deutsch-Alltenburg covers the site of the roman upper pannonian provincial capital Carnuntum. Ongoing archaeological research began in the second half of the 19<sup>th</sup> century and led to the uncovering of parts of the antique civil and military settlement. Although the conservation and presentation of the ruins was taken in consideration from the beginning of scientific research (1904 Opening of the Museum Carnuntinum in Bad Deutsch Altenburg), it was only 1993 that the ruins of two amphitheatres and parts of the civilian settlement were transformed into an archaeological park (Archeologischer Park Carnuntum, abbreviation APK) by initiative of the Lower Austrian County Government. The objective of the initiative being the creation of a new touristic attraction evoking new jobs and an economic impulse in an area of economical structural weakness, long times isolated from the economic development by the nearby iron curtain.

The management of the open air sites, covering three key-zones (the civilian settlement, the military amphitheatre) and the Museum Carnuntinum was handed over from the county's cultural department to a private plc by the creation of the Archaeological Park Carnuntum Operation (plc) in 1996. Today it is besides the Schloss Schönbrunn, Vienna and the Castles of Salzburg one of the three private based Cultural Heritage Management Institutions in Austria.

The innovative elements in the conception of the APKplc are the marketing of an archaeological site by specialised seasonal accompanying events with varying topics focussed on strategically separated target groups. The core of the enterprise being the equilibrium between optimal commercialisation and science. That both sides can profit from each other is shown by the fact that the economic success of the APKplc made it possible to reinvest in scientific conservation and research.

An essential objective for the management of APKplc is the socialisation of the archaeological park in the region. This aim is tried to be achieved through the opening of the parks cafeteria for the locals and via co-operations with regional associations.

The APKplc is Member of the International Theme-park Association IAAPA.

Since the first quarter of 1999 the APKplc is head of the association Arge DONAUREIGEN, an interregional network of touristic sensations ( the Donau Auen National Park; the Safari and Adventure Park Gänserndorf, the association of historic residences in the Marchfeld and the

Archaeological Park Carnuntum ) and the regional Tourism associations along the rivers March and Danube in North-eastern in Lower Austria. The partners were selected due to quality of the touristic offers and the standards of services. Associated are selected gastronomic and accommodation enterprises in the two regions, the regional wine growers federations and cultural events in the area.

This initiative is a three year co-operation supported from the EC through means of the INTERREG Programme. The project based on human and financial resources of all the partners offers a common marketing line and centralised tour booking under the trademark DONAUREIGEN with specialised folders for individual tourism, together with a confidential for group tourism enterprises.

### **Institutional engineering:**

The APK is a private limited liability company (plc) headed by a managing director. Its shareholders are the Niederösterreichische Hypo-Leasing who holds 95% and the Friends of Carnuntum Association (Gesellschaft der Freunde Carnuntums e.V.) a private based society for the support of scientific research in Carnuntum.

The archaeological objects, the sites, the museum and the scientific research remain in the responsibility of the Cultural Division of the Lower Austrian County Government, represented by the scientific chief of the archaeological park and his staff.

The APKplc is responsible for the management and operation of the archaeological park. This bifold construction relieves the scientific part from all questions of management and allows on the other hand to operate the archaeological park as a private company.

The ancient remains being the core of the enterprise, their protection is to be considered carefully in view of marketing and presentation decisions, thus outlining and limiting the possibilities. Therefore all programmatic decisions of the APKplc are discussed by an advisory board consisting of experts from the Federal Bureau for the Protection of Monuments, the scientific chief of the Archaeological Park, officials from the Cultural Division of the Lower Austrian County Government. The economical aspects of the enterprise are taken into account by a permanent representative from the pool of sponsors as member of the advisory board.

The APKplc operates with an annual budget of 10 MIO ATS. The Lower Austrian County Government supports the enterprise with 4 MIO ATS. The rest being obtained from entrance fees, museums shop and merchandising, the cafeteria lease and by sponsoring. Around 400.000 ATS being lucrated from private sponsoring alone

The main sponsors are:

- Römerquelle - Austrias most important mineral water producer
- OMV - The Austrian Mineral Oil Administration
- Raika - Petronell - the local branch of a Bank
- Mac Arthur Glenn Designer Outlet
- Volvo

The sponsors are represented in the media and advertising media (like folders or the WebPage) of the APKplc as well as in archaeological park itself with their logos (the cafeteria or on information boards, tents etc.) and with some of their products e.g. in the shuttle service connecting the different sites.

### **Strategies toward the public:**

The objective of the APK(plc) is the visitor and service centred presentation of the remains form the roman provincial capital Carnuntum and of different aspects of daily life in roman antiquity

according to an education mission connected with the high degree of pupil visitors in the park. An maximisation of turnover and visitor numbers is intended, according to the maintenance of high quality.

The main strategies of the APK(plc) are:

- ❑ Creation of visitors attractions based on the presentation of the actual ancient remains: E. g. by development of different theme paths, a roman herbal garden, life presentations and workshops of ancient craftsmanship and other elements of ancient cultural history as well as periodic special events like, roman festivals (saturnalia), gladiators games or re-enactments of roman military life and accompanying exhibitions.
- ❑ The interactive information terminal is currently being extended by a virtual walkabout in reconstructed parts of the ancient city in co-operation with the Technical University of Vienna.
- ❑ Offers of specialised package programmes together with partners in the region adapted for different target groups: Project weeks (roman workshops), summer camps in reconstructed roman military marching camps, roman birthday parties etc., especially designed for children and youths, including a lot of „hands on“ reconstructions of ancient armour, clothing, writing utensils etc. stressing the pedagogical aspects of museology
- ❑ Special incentive programmes for enterprises
- ❑ Organisation of summer concerts and film festivals (e.g. Antiquity in the movies)
- ❑ The main objective is to offer of high quality services, reaching from guided tours to the refreshment sector

The primary target publics are besides pupils, families, national and international visitors situated in Vienna and the surrounding (up to a 70 km circle). Information exhibitions in the slovaque capital Bratislava and in Kempten, Germany illustrate the tendency to expand the market.

Due to the rather small permanent staff there has been a limited segmentation in different departments up to now.

The managing director, backed by an assistant director is responsible for the PR and marketing and programme design (this in accordation with the advisory board). Currently the APKplc is undergoing a process of regroupment based on process orientated and structurised staff discussions, targeted on a new organisational structure with clear defined departments. The aim of this reorganisation is the installation of TQM in the APKplc.

The first outcomes of the process will be communicated in the seminar.

Marketing and promotion activities range from temporarily exhibitions to posters, flyers adverts in Newspapers (e.g. the Austrian Airlines Boardmagazine) to a web site presentation.

The design of offered events and services is based on a target group analysis made in 1996, showing the demand of market segmentation into specialised children, pupils, youth and thematic programmes. The results of a visitor analysis in spring 1999 proofed the effectiveness of this decision.

Current statistics list 70.000 visitors per year, making the APKplc one of the most successful cultural tourism enterprises in Austria

### **Policies towards the staff:**

The APKplc currently has nine permanent and around 40 seasonal employees.

The permanent employees have their special fields of responsibilities e.g. tourism matters and bookings, accounting, personnel and stockmanagement. Due to the small size, the permanent staff is interacting closely and is directly incorporated in formative processes.

The seasonal employees are predominantly working as guides and interpreters. Stemming from different professional backgrounds and experiences, they are incorporated in the development of different projects e.g. of concepts especially for school classes or in the conception of the interactive information terminal. A high degree of qualification is achieved through annual compulsory professional training in archaeological-historical topics as well as in interpretative techniques and foreign languages. The acceptance as guide or interpreter is given after a trial guided tour and the completion of the annual two days workshop.

The Trainers involved come from the Cultural Division of the Lower Austrian Government, the Austrian Archaeological Institute and the Archaeological Department of the Austrian Academy of Science.

The management considers feedback from the guides and interpreters concerning existing structures or novelties as very important because of them being in direct contact with the visitors.

As indicated above the staff is currently undergoing a fundamental transformation. Group talks with the two assistants and structured single talks with all the employees are currently held in order to develop the new organisational structures, responsibilities and clear defined job specifications. Projected is the installation of so called consultants recruited from the tour guides and interpreters staff, as dynamic stream of information and inspiration for the management, concerning the improvement of offered services.

The output of the restructuring should also lead to a mission statement and the development of corporate identity.

The current system of staff training is planned to be expanded to a permanent training institution for the staff and for externals.



# **Ars Aevi Project**

## **Valeria Beolchini**

### **Short Description:**

The International Cultural Project, Ars Aevi, was first presented at a Forum for artists and intellectuals held in Sarajevo in July, 1992, just three months after a state of emergency was declared in the city. In ensuing months, between 1992 and 1993, the project was discussed and approved by the Sarajevo Arts Council, the Ministry for Cultural Affairs and the Government of the Republic of Bosnia and Herzegovina. Ars Aevi received sponsorship from UNESCO in 1998 and from the Council of Europe in 1999. The primary goal of the project is to create a major European and world-wide Centre of Contemporary Art, whose principal seat will be the prospective Ars Aevi Museum. The underlying objective is to create the conditions necessary for establishing in the city, devastated after four years of bombing, a permanent point of cultural exchange between artists and intellectuals of world-wide renown. A traditional meeting place of the religions and cultures of East and West, Sarajevo had already hosted cultural events of international scope prior to the outbreak of the war. These included the winter Olympic Games in 1984 and the Biennial Exhibition of Modern Art, "Jugoslovenska Documenta", in 1987 and 1989. The city has long been home to a number of major academic and artistic institutions with ties to the worlds of cinema, dance and music. This civic tradition, so deeply rooted that not even months of siege in the capital could bring it to a halt, is the bedrock upon which the general director of the project, Enver Hadziomerspahic, has established the "Ars Aevi" project. Hadziomerspahic states, "the artists of our times are aware of the injustices suffered by Sarajevo, and it is the artists themselves, with their optimism and enthusiasm, who can offer a great contribution in order that the city may once again be free, open and beautiful, by creating a museum which from its very inception will herald the superiority of the spirit and of art over the forces of evil and of destruction."

On the basis of this conviction it was decided that the works for the museum collection should be procured through a series of individual and collective donation-exhibits organised in cities characterised by their long cultural traditions and amicable relations with Sarajevo. Thus, the artists and their donated works represent both a testimonial to, as well as a means of reflection upon, major examples of European and world-wide contemporary art as the second millennium draws to a close.

### **Interaction, Cooperation, Partnerships:**

The project was made possible by the persistence and idealistic enthusiasm of its creator, Enver Hadziomerspahic. Recognising that his war-ravaged country could offer only its official authorisation to represent the interests of "Ars Aevi" abroad, Hadziomerspahic decided to come to Italy in 1993, in search of backers and potential sponsors.

Hadziomerspahic has consistently resisted conditioning of the project by the dynamics typical of many initiatives for solidarity. His efforts are commendable, as they serve to safeguard the symbolic value of the project as a representative collection of the major contemporary European and world-wide artists at the end of the millennium.

For similar reasons, the realisation of this major international event was not entrusted to one single curator or to a single elected committee. Instead, an invitation was extended to the cities on amicable terms with Sarajevo, as well as to their museums and modern art centres, to take part in the project as true founders of the collection.

The collaborative model adopted stipulates that each museum, upon accepting the role of Ars Aevi collection founder, include a donation-exhibition for the Sarajevo museum on its

annual calendar of events. The choice of invited artist participants is left to the discretion of the scientific or artistic director of the founder-museum, and artists are asked to make a donation of one of their works displayed.

This well-established model was first proposed at the end of 1994 by Enrico Comi, director and founder of the “Centro Arte Contemporanea Spazio Umano” in Milan. A number of donation-exhibits were organised there and included the participation of artists such as Michelangelo Pistoletto, Inspection “Medical Hermeneutics”, Franz West, Carla Accardi and Nagasawa.

In 1996 the number of collection founders grew, and other major international artists including Balkenhol, Buren, and Enrico Castellani were invited to the “Luigi Pecci” Museum in Prato to participate in the first collective donation-exhibit for the Ars-Aevi project. Prato, along with Venice, is one of the first Italian municipalities to have become a supporter of the project. In fact, the Ars Aevi project was given its first international press coverage during the 1993 Biennial Exhibit in Venice. Since then, strong relations have been established both with the mayor of Venice and with the organisers of the important Biennial Exhibit as well as with the “Bevilacqua La Masa” Foundation, which has also joined the circle of collection founders.

This summer (June 25 - August 31, 1999) in Sarajevo was the occasion of the first exhibition of the 105 works of art collected thus far for the “Ars Aevi” Museum. The installations, video art, sculptures, paintings and photographs were displayed at a multipurpose centre, the “Centar Skenderija”, as there is no permanent facility for the museum as of yet. The creation of exhibition space is foreseen as the realisation of phase two of the project. Plans include the construction of a series of multipurpose pavilions in Sarajevo. Each pavilion will represent one participating nation and will serve as a point on the walk-about tour of contemporary art planned. World-famous architect Renzo Piano was invited to design the Italian pavilion, and on June 26 he unveiled the blueprints at a press conference in Sarajevo. Negotiations are currently underway with Austria for the construction of another pavilion, and other European nations, including England and Spain, will also soon be contacted.

#### Project Founders

Skenderija Centre, Sarajevo (1992)

The City of Sarajevo (1993)

#### Sponsors:

The Canton of Sarajevo (1995)

The Federal Ministry of Education, Science, Culture and Sport of the Federation of Bosnia and Herzegovina (1996)

UNESCO (1998)

The Council of Europe (1999)

#### Collaborators:

ARCI, Nuova Associazione ARCI Milano (1993-1999)

NAVA WEB spa (1993-1997)

Creative Center Cardea, Sarajevo (1993-1999)

#### Collection Founders:

Centro Arte Contemporanea Spazio Umano, Milan (1994-1999)

Galeija Obala art centar, Sarajevo (1994-1998)

Centro per l'Arte Contemporanea Luigi Pecci, Prato (1996)

Moderna galerija Ljubljana (1996)

Fondazione Bevilacqua La Masa – Fondazione Querini Stampalia, Venice (1997)

Museum moderner Kunst Stiftung Ludwig, Vienna (1998)

Promoters:

Biennale di Venezia (1993/95/97/99)

Art Press, Paris (1998-1999)

Manifesta 2 Biennale européenne d'art contemporain (1998)

Casino Luxembourg Forum d'art contemporain (1998)

Supporters:

ANCI Toscana, Association of the Tuscan Municipalities (1995-1999)

The Municipality of Prato (1995-1996)

The Municipality of Venice (1996-1997)

The Municipality of Impruneta (1996-1998)

The Municipality of Chianti (1997-1999)

LEGACOOOP Roma (1997-1998)

COOP Adriatica; COOP Consumatori Nord Est; Manutencoop Bologna; C.C.F.R. Consorzio

Cooperative Ferrovie Reggiane (1997)

COOP Liguria; COOP Lombardia; Fincooper (1998)

Industrialists Association of the Province of Florence (1998)

The Province of Florence (1998)

The Lombardy Region (1998-1999)

The Province of Milan (1999)

The Tuscan Region (1999)

Partners:

Giunti Gruppo Editoriale (1998-1999)

Artemide (1999)

# Castello di Rivoli. Museo d'Arte Contemporanea

Alessia Rossi

## **Innovative Key-points:**

The *Castello di Rivoli Museo d'Arte Contemporanea* is one of the few contemporary art museums existing in Italy today. Privately-based and operated, it is a not for profit association legally recognised by the Region of Piedmont. It represents the first attempt in Italy to implement management of a cultural heritage institute on a mixed public-private basis. Partners include public agencies, corporations, private associations and individuals. This model, which foresees the participation of private partners in the financing of a museum complex, also represents one of the first instances of a viable alternative to more traditional forms of corporate sponsorship of the arts.

## **Short Description:**

The Rivoli Castle - Museum of Contemporary Art was opened in 1984 on the initiative of the Region of Piedmont. Today it is considered one of the most important points of reference for contemporary visual arts world-wide. It is one of Italy's few contemporary art museums, and constitutes, along with the *Centro Pecci di Prato*, an interesting experiment in management by a mixed private-public partnership. The museum is located in the splendid baroque residence which was designed by Filippo Juvarra in 1718 for King Vittorio Amedeo II, but which was never completed. Built on the remains of a medieval castle and later adapted by Emanuele Filiberto for use as a residence of the House of Savoy, the building itself represents a major attraction for many museum visitors. Along with a tour of the museum collection, visitors are also offered the option of touring the rooms of the residence, which have been completely opened to the public.

Restoration of the building was overseen by the architect Andrea Bruno and was completed just a few months ago. Complete reconstruction of the *Manica Lunga* wing of the building, a 17th century addition to the castle, increased the total area of the museum to approximately 9,700 square metres.

The permanent collection contains works by national and international artists, including some commissioned especially for the museum space. The collection also includes representatives of all of the principal currents in contemporary art, and continues to grow as the result of new acquisitions, donations and long-term loans. The museum holdings, which are exhibited on a rotating basis, constitute an important record of artistic activity from 1945 to today.

The museum is extremely active in the organisation of temporary exhibitions and cultural events including courses, conferences and festivals as well as film, music and theatre series which are produced in collaboration with other organisations and institutes. The yearly calendar of events generally includes six exhibitions. Typically, two exhibitions are run simultaneously each season, along with a number of accompanying cultural programmes targeted towards the general public as well as to a more specific audience of specialists. The Rivoli Castle also frequently organises exhibitions in collaboration with foreign institutions. It is also a member of the local *Sistema Arte Moderna e Contemporanea* (the System of Modern and Contemporary Art) - the SAMC.

## **Institutional Engineering:**

In 1984 the Region of Piedmont founded the Association for the Rivoli Castle - Museum of Contemporary Art, in order to encourage participation by public agencies, corporations, private associations and individuals in the management of the museum. The Association is a not for profit organisation working at the level of the regional territories. Its aims are study, instruction, scientific research and documentation in the fields of culture and the arts. Founding partners of the Association, in addition to the Region of Piedmont, were the City of Rivoli, the Province of Turin, the City of Turin, Inassital and the public notary Marocco.

In 1988, the *Banca CRT - Cassa di Risparmio di Torino* (the Turin Savings Bank), FIAT and GFT also joined the Association, making financial contributions of just less than 50% of the annual budget. At the close of 1994 when the original mandate expired, the Board of Directors agreed with the Regional Administration to reorganise the institutional and operating structure of the Association, which is responsible for operating and managing the museum. The managing bodies of the museum are the Board of Directors, the Members' Committee, the Planning Committee, the President and the Director.

The Members' Committee, which includes the Region of Piedmont, the City of Turin, FIAT, the Turin Chamber of Commerce, Industry, Artisans and Agriculture, Telecom Italy and the *Fondazione CRT - Cassa di Risparmio di Torino*, manages and oversees the institutional aspects of the museum. The Board of Directors is made up of representatives of the financial partners, and manages the ordinary functioning of the Rivoli Castle as a permanent structure and facility.

The Planning Committee was introduced under the new legal structure defined in 1994. It includes an equal number of representatives from the Board of Directors and of the financial backers, and is overseen by an honorary president chosen for their distinction in the sector of culture and contemporary art. This committee is responsible for programming and managing museum activities such as expositions and cultural series. It also makes decisions concerning acquisitions for the collection, is responsible for electing the Artistic Director and generally overseeing museum operations. The Planning Committee, which is made up of financing bodies and individuals, are responsible for the cultural life of the Museum of Contemporary Art. This arrangement allows for the stable management of the castle while granting flexibility to the planning and realisation of cultural activities and events.

The Artistic Director of the Museum is nominated by the Board of Directors, while the President of the Members Committee is selected on the recommendation of the President of the Region of Piedmont.

Financial backers include those bodies or private individuals who make a three-year commitment of contributing at least £150 million (approximately 77,500 Euro) annually. The museum raises additional funds through sponsorship of temporary exhibitions.

The 1998 budget was approximately £5 billion (about 2,500,000 Euro). Approximately 80% came from public and private sources; 10% derived from ticket sales; 5% from service-derived income, such as leasing museum space for meetings, courses, conferences; and 2.5% of the budget was contributed by the Friends of the Museum Association.

The institutional participation of privates in the financing of the museum offer an alternative to the model of simple sponsorship. In the case of Rivoli it represents another facet of the museum's innovative character. The fact that the president is chosen from among the private partners and members of the Region of Piedmont reflects a commitment to encouraging active participation by private members in the management of the museum.

Amendments to the articles of the association reflect the solutions adopted as the result of the museum's experience, and allow for further growth in the number of privates participating in the initiative. This form of management solution may prove useful as model for other museums.

## **Policies towards the Public:**

Management and decision-making concerning museum policies and strategies towards the public have been the shared responsibility of two departments since 1995: the Department of Consultants to the Direction and Communications and the Education Department. The co-ordinated efforts of these two groups are geared towards the promotion of both the permanent and temporary activities of the museum. One aim is to increase the number of visitors to the museum by identifying potential new target groups, and to attract a more diversified public than the traditional school groups. Their joint efforts are also geared towards augmenting the economic resources of the museum. The management of this organisational structure which plans, conducts and co-ordinates the promotional efforts of the museum, is the responsibility of a group of museum employees along with twelve external collaborators planning specialised activities. For example, an expert in semiotics researches and prepares thematic tours geared towards different target groups of the public. Using this policy, the museum has consistently met and surpassed its target goals for museum admissions.

The total number of visitors to the *Castello di Rivoli - Museo d'Arte Contemporanea* in 1998 was over 60,000, not including the number of guests at exhibit openings. The largest number of visitors was recorded during temporary exhibitions. Rivoli belongs to the museum group of the Turin metropolitan area, and participates in the Museum Subscription and Museum Card project. In 1998, the castle was the fourth most popular visit among subscribers.

In addition to the cultural events and series as well as the didactic events organised by the museum (which, unlike in many other museums, require an entrance charge), the promotional co-ordination of the castle organises its own activities, including innovative initiatives such as the recent stands at the Book Fair, the Music Fair - Musica 200, and at Artissima, the Modern and Contemporary Art Festival.

## **Educational Program**

The museum actively encourages the organisation of didactic activities, especially for schools. The Educational Department plans guided tours geared towards the various target groups in addition to training programs, experimental laboratories, and refresher courses for teachers and students.

Guided visits are available to both scholastic and non-scholastic groups, and include specific programming planned according to the needs of each group in co-ordination with the museum staff. There are also free pre-view tours designed for teachers.

Refresher courses in modern and contemporary art and in art appreciation are offered to teachers, and are designed according to the particular needs of each school's syllabus. The Educational Department also produces a number of informational cards, maps with guided tours and didactic games for all grade-levels.

A committee of teachers, whose members come from a wide variety of backgrounds and teaching experience, collaborates with the Educational Department's didactic programme in order to produce specific volumes for use as auxiliary material for each individual exhibit. The museum also organises pilot workshops, both at the castle and in the schools, in order to test new materials for learning about works of art. The workshop activities are co-ordinated to reflect the nature of the temporary and permanent exhibits at the museum.

Upon request, the museum also sends its own personnel and experts into the schools to give talks on contemporary art and on museum activities.

In order to offer a new approach to the understanding of contemporary art and museums, a number of projects have been designed for all levels and types of schools. These include a number of special projects which were planned in collaboration with public organisations such as the Ministry of Education, the Turin Board of Education and a number of academic institutions.

For students from the University and from Art Academies, the museum organises a number of events such as conferences, video and film series and a pilot workshop in experimental video. Each activity is planned according to the specific needs of the participating schools.

Training programmes are offered by the museum with the dual intent of familiarising students and graduating students with the cultural sector and of introducing them to the world of employment. Most of the one or two-month programmes are held at the Rivoli Castle, and include a theoretical component taught by an expert at the museum along with a practical component concerning museum organisation, communication, promotion and educational programming. The Castle has organised several joint degree programs. These include programs with the University of Turin in Communications, a degree program with the University of Pavia in Cultural Heritage, and with the art academy, *Accademia di Brera* in Milan.

As of 1998 the museum has offered a scholarships to graduates in Communications who have participated in a training program at the Rivoli Castle and whose degree thesis was on the subject of museums or contemporary art.

### Consultation and Research

Access to the museum's public library and video library has improved greatly since the opening of the new wing, the *Manica Lunga*. A research and experimental studies program was introduced in 1998 with the aim of introducing the study of contemporary art into compulsory schools. In 1993 the experimental studies program was officially recognised by the Ministry of Public Education, who assigned a teacher to the museum to track and record the results of the program activities.

### Additional Services

In addition to booking services for guided tours of the permanent collection and of temporary exhibits, the museum houses a coffee shop and a book shop which sells publications on contemporary art and art objects.

With the restoration and opening of the *Manica Lunga*, a number of conference and meeting rooms were also created and are available to lease. In January, 2000, a new building will be inaugurated, and will house a spacious restaurant run by an external organisation.

Annexed to the museum but with a separate entrance is a theatre of approximately 100 seats which is suitable for conferences, projections, concerts and shows.

# Schönbrunn Castle

Monika Horny

## **Innovative key-points:**

Schönbrunn Castle is the first case in Austria in which the administration of a precious historic-artistic monument owned by the Austrian Republic and of significant importance for its sense of identification in the history of Austria has been transferred to another entity.

The scope of this case study is to illustrate the effective transformation of the Castle's administration into a modern service agency. This example demonstrates how a cultural enterprise can be managed applying the principals of a private company.

The separation of the Castle from the State received a great deal of media attention and sparked a passionate debate among experts as well as in the public opinion.

In fact, for the past seven years this private company has been able to manage the Castle with great success from a financial point of view, without State assistance and with maximum regard for its historic value.

## **Short description:**

The Castle in its current form was commissioned by Emperor Joseph I, designed by Johann Fischer von Erlach and built between 1695 and 1711. In 1740, in the reign of Maria Theresa, the Castle became the official summer residence and the Empress has it modified in three phases: the first two phases, under the direction of Nicolaus Pacassi, resulted in the theatre (1747) and the limonaie (1755); the third phase (1764-1780) concentrated mainly on the gardens. The architect Johann Ferdinand von Hetzendorf designed the Gloriette (1775), the Roman ruins (1776), Neptune's fountain (1781) and the obelisk. Between 1817 and 1819, during the reign of Francis I, the court architect Johann Aman modified the facade.

Including its park and zoo, Schönbrunn Castle covers an area of approximately 1.5 km squared.

Since the end of World War I the Castle's park had been a popular leisure and gathering place for the Viennese. The Castle has been a tourist attraction since the sixties, and today has approximately 6.5 million visitors a year: of which 1.55 million visit the Castle and 5.2 million just the park.

Schönbrunn Castle is today one of Austria's most important cultural monuments and is considered one of the most important Baroque complexes in Europe. In 1918, at the end of the Hapsburg Empire, the Castle became property of the then newly established Austrian Republic. Up until 31.9.1992 Schönbrunn Castle was managed by the Schloßhauptmannschaft of Schönbrunn, which was tied to the Ministry of Economic Affairs.

## **Institutional engineering:**

### **Problems present prior to the change to a private company**

Despite high number of visitors, the Castle's Administration had been unable to create a solid economic base that would allow it to autonomously finance the revitalization measures deemed necessary at the time. The State funds made available were not sufficient to finance the restorations to the Castle's buildings and courtrooms. One of the main problems was the Ministerial bureaucracy, which is based on decrees, directives, depositions, and regulations that are difficult to reconcile with a modern service agency oriented towards a market economy and in need of flexibility.



In accordance with the principle that all budgeted costs must be covered it was not possible to apply reserve funds to long-term projects. An increase in the price of admission had to be requested through the appropriate Ministry office, which had the option of refusing it. As a result the admission price remained the same for 10 years.

It is clear that this type of arrangement did not favour personnel motivation. In the early nineties the building's conditions deteriorated further and the need to make the Castle profitable became even more pressing.

Solutions suitable to the historic value of the building were sought. It was decided to outsource the administration of the complex entrusting it to a private company. It was anticipated that this would on the one hand provide funds, through increased revenue, which could be invested directly into the restoration and conservation of the Castle, on the other hand provide, through a private company structure, the flexibility needed to react to market conditions.

#### Schloß Schönbrunn Kultur- und Betriebsgesellschaft m.b.H. (Cultural and Entrepreneurial Limited Liability Company)

Since October 1<sup>st</sup> 1992 the Cultural and Entrepreneurial Limited Liability Company of the Schönbrunn Castle has been responsible for the administration of the complex.

The Company, fully owned by the Austrian Republic, is led by two administrators who are responsible for its business and technical aspects and supervised by a nine member Supervisory Committee with the following make up:

- two individuals from the private entrepreneurial sector
- four individuals from the Ministries concerned (Finance, Economic Affairs, Education and Agriculture)
- three internal commissioners.

There is also an advisory committee to assist with the resolution of historic-artistic and tourism questions.

The entire complex has been entrusted to the Schloß Schönbrunn Kultur- und Betriebsgesellschaft m.b.H., including the buildings, through a rental agreement. The park, admittance to which continues to be free, is in the care of State gardeners.

The Company performs the following functions:

- management of the courtrooms, which are the most important section
- building administration: the total surface of the rented space is approx. 65,000 squared metres. The administration of the complex is undertaken together with a large real estate company.
- food and beverage services: there are six restaurants, all rented or contracted out
- retail services: there are eight shops, two of which are directly managed by the Company
- event management.

#### The restructuring process

At the outset it was important to identify and implement operational efficiency measures that allowed for an immediate and significant increase in revenue and reduction in costs.

A primary factor in achieving these objectives was a frictionless transition from the Ministerial bureaucracy to a company managed according to private sector principals. At the same time the entire commercial division including payables/receivables, cash flow management and EDP was set up from scratch with the assistance of external consultants.

#### Cost reduction measures

Personnel was a major expense immediately addressed as only 35 of 110 employees made the transition from the Castle's former administration to the new Company. Certain divisions such as

the warehouse and the electrical system maintenance were outsourced. Thereby reducing the personnel need by 25-30%.

Further savings were realized in the area of administration thanks to a new monitoring system that clearly defines responsibilities and allows for immediate identification of weak points in administration. In this regard the management information system is also an important source of information on attendance trends and a other data interpretation.

#### Short-term measures to increase revenue

The increase in revenue was achieved through a package of diverse measures. Admission prices, which had remained unchanged for a decade, were raised in consideration of the fact that proceeds from tickets is the largest revenue source. The nominal value of 50 schillings per person earned on average proceeds of 35.12 schillings (se fig.2). The admission price, which by international standards was very low, was raised in first two years in two phases. Today admission prices range between 95 and 150 schillings. The quota of free and discounted tickets was also significantly reduced.

The Museum Shop, which was the second largest revenue source, was inadequate in terms of size, selection and profitability. Increasing the size of the Museum Shop to better handle visitor traffic was an important step. The new Shop, with a surface of 250 squared metres, is located at the exit of the spaces open to the public. The product selection was increased and includes products that make reference to Schönbrunn Castle. In this sector the spending per visitor had increased from 3.30 schillings to 20 schillings.

Another significant factor in increasing revenues is rental fees. Attempts were made to align rental fees with fair market value, though this was not always possible as the law makes it is difficult to change pre-existing contracts. Revenues were also increased in this sector by making tenants responsible for all operating costs and making them contribute to maintenance costs.

Increasing the ways the space is used derived further revenues. This initiative is aimed at renting space to companies that are looking for a unique setting to host receptions or seminars as well as local cultural organizations which rent the space to for concerts or other performances. Innovations have also been introduced in the food and beverage services. Rental contracts have been reviewed and where possible rents have been increased and the quality improved. New more appealing restaurants have been opened.

In 1993, after just one year under an administration that followed private sector principals, revenue doubled form ATS 62.4 million in 1991 to 120.5 million in 1993. In 1998 revenues reached ATS 251.5 million. In the meantime almost one billion schillings of self-generated revenue have been invested in the revitalization and restoration of the Castle. This long-term objective, which had been projected over ten years, has already almost been reached.

#### Long-term objectives

One of the Schloß Schönbrunn Kultur- und Betriebsgesellschaft long-term objectives is to maintain the complex in its original state.

The intent is to create a museum dedicated to imperial daily life. This new type of museum has to maintain a strong element of living an experience in presenting the daily life of the royalty that resided at Schönbrunn with reference to the historic-artistic context. The aim is not to present artefacts of historic-artistic value but to present the environment in which the royals lived, and their habits in private and ceremonial life.

### **Policies towards the public:**

#### Marketing measures

Schloß Schönbrunn Kultur- und Betriebsgesellschaft m.b.H. is first and foremost a service company (Corporate Identity). For every level of customer there are specific services, for example major clients have the option of non-cash payment. An information office located at the entrance of the Castle offers a variety of services including a buffet, currency exchange and Museum Shop. Via a video system the visitor can obtain all the information necessary for the visit to the Castle as well as information on other cultural offerings.

A customer database, which includes information on attendance trends, visitor comments and wishes, allows the organization to quickly address visitor needs. The database also allows for the elaboration of visitor demographics that is used in planning the range of visit possibilities and visitor flow.

A range of visit possibilities has been established with a corresponding range in admission prices: for a lesser price visitors can view part of the Castle without being accompanied by a guide. Smaller groups allow for a more enjoyable visit and the spaces that need the most care, in the Castle's east wing, can only be visited with a guide.

Tourists account for 94% of the Castle visitors. Thanks to its popularity and well-established presence the Castle does not need to promote itself to the tourism sector. A long-term objective is to diminish the Castle's dependence on tourists and remove the excessive tourism pressure. Therefore it is important to identify new visitor groups. It is with this in mind that the administration is making every effort to render the Schönbrunn Castle newly attractive to the local population. Exhibits and cultural events, such as the "Zu Gast bei Maria Theresia" (Guests of Maria Theresa) or the Christmas market are the first steps in this direction. This effort will require a strong advertising campaign.

### **Interaction, cooperation, partnership:**

Schönbrunn Castle is a member of the Residences Royales en Europe. On a national level it belongs to the Via Imperialis, a network of 50 Austrian castles, monasteries and fortresses.

#### WUK-Schönbrunnprojekt

This project is a collaboration between AMS (local employment office), WUK (Werkstätten und Kultur Haus – Laboratories and Culture House, Vienna) and Schönbrunn Castle.

It is a training program offering an apprenticeship of at least one year for youths under 25 who have interrupted their studies. Youths from periphery areas and troubled social situations receive professional training as painters and decorators as well as socio-pedagogic assistance. As part of their training the youths assist with the restoration of Schönbrunn Castle.

#### Research collaboration

##### Climate study

The "Klimaforschung in Schönbrunn" (Study of Schönbrunn's climate) project was launched in 1995 and concluded in 1998. The project's objective was to establish a basis for the stabilization of the microclimates in the Castle's spaces. The project was funded by Forschungsförderungsfond (FFF, Research fund) and EURO CARE. As part of the project comparisons were made with other museums (Kunsthistorisches Museum, Kartause Mauerbach, Skokloster/Sweden, Nordiska Museet/Sweden, Stiftung Ostdeutsche Galerie Regensburg/Germany, Brezice Castle/Slovenia).

#### Conclusion

Schönbrunn Castle is a convincing example of how a cultural enterprise can be run following private sector principals and it demonstrates the earning potential of the cultural sector. Applying private sector principals does not imply a loss of quality or a "Disneytisation". On the contrary, it

is the maintenance of the original historic-artistic complex that is the cultural enterprise greatest asset. In this respect the Schönbrunn Castle has to be considered an exemplary case on a national and international level.

In other sectors, such as the museum or library sectors, such a radical entrepreneurial action is impossible or at least very difficult, as the potential for commercialisation is much smaller and the curatorial aspect is tied to the politics of academia, which is not a profitable resource.

#### Financial comparison 1991-1998

1991 was the last whole year under the State administration, 1993 the first under Schloß Schönbrunn Kultur- und Betriebsgesellschaft m.b.H.

	<b>1991</b>	<b>1998</b>	<b>differenza</b>
Revenue per employee	ÖS 686.000	ÖS 2.002.000	192%
Personnel expenses as a percentage of revenue	48%	22%	-54%
Building maintenance and restoration expenses	ÖS 42.855.000	ÖS 120.800.000	182%
Admission ticket revenue	ÖS 49.335.000	ÖS 122.900.000	150%
Revenue from each ticket sold	ÖS 35,12	ÖS 79,14	125%
Museum Shop revenue	ÖS 3.989.000	ÖS 29.500.000	640%
Rental and special event revenue	ÖS 3.360.000	ÖS 17.500.000	421%
Operating profit		ÖS 4.717.000	

# Royal Castle in Warsaw

Agata Wasowska Pawlik

## Short description

The origins of the Royal Castle in Warsaw reach back to the middle ages. It was the ancient residence of the Mazovian and Polish Kings, as well as the seat of the Sejm during the Commonwealth. After Poland regained independence in 1918, it became the residence of the President of the Republic. Bombed during combat in September 1939, it was blown up by the Nazis in 1944.

The plan to rebuild the Castle failed to win approval from the Communist authorities for many years. The decision to reconstruct it finally was made in 1971, rewarding the attempts of the nation's intellectual elite to recreate this symbol of Polish statehood. The reconstruction of the Castle was funded exclusively from contributions of individual Poles at home and abroad. The walls reconstructed in 1971-84 incorporated salvaged fragments of stone, stucco-work, murals, and wall paintings; the interior was furnished with original works of art that had been rescued before the Castle's destruction.

Museum of Royal Castle in Warsaw is a perfect example of museum policy towards public as the number of the visitors and self income increased during last few years. The Museum offers permanent and temporary exhibitions and uses them as a basis for further work. There are variety of services for school children, students and adults. About 50 Museum lessons topics (about the castle itself, history of Poland etc.) addressed mainly for schools, some of them combined with theatrical performances. Museum workshops organised by the Education Section aim at encouraging people to be active and creative after being inspired by some aspect of history, work of art or building. There are also Theme Tours that helps to discover the Castle in the context of Polish history. Every month at least 5, 6 music concerts are organised, two festival of chamber music are held annually at the Castle. Every Sunday film projections.

# **Croydon Museum, in Croydon Clocktower, an Arts and Libraries complex**

Judi Caton

## **Innovative key-points:**

Croydon is a leading exponent of the trend towards cultural empowerment among UK museums, towards visitor-centred museums, and billed itself as the first truly interactive museum. Croydon was the first museum in the UK conceived through extensive qualitative customer research (focus groups), with audience-led display themes, and prototype tested displays. The Lifetimes Gallery, opened in 1995, is directed to the needs of particular groups of Croydon people.

The model is particularly relevant to all those towns and areas where the expression of cultural diversity is an important part of museum interpretation, in other words among all multi-ethnic communities. But it is a useful guide for any authority that is seeking to improve access to a wider than traditional audience.

## **Short description:**

Croydon is a London borough, one of the 32 that make up greater London. It takes about 20 minutes on the train from central London to reach Croydon, which has the largest borough population in London about 333,800. 21% of Croydon people are from minority ethnic groups, and 11.5% are estimated to have a disability. Croydon is a major regional commercial and retail centre.

The council developed a museum service from the late 1980's, and the new galleries were opened in 1995, 50 years after the last museum service closed. The displays are based on extensive oral history (over 300 histories) and were developed by asking local people to say what sort of museum they wanted and what they wanted it to cover. People with disabilities, Black and Asian people and other groups often excluded from museum displays have contributed objects and memories to the exhibition. This process of cultural empowerment involves the visitor-centred building of displays and services, and relates directly to the needs of diverse groups within a local community.

The museum includes a permanent local social history gallery called '*Lifetimes: the interactive museum of Croydon and Croydon people*'. This is an object based display of 240sqm covering the period 1840 to the present, interpreted through touchscreen interactives accessing mini-documentaries giving the local context and national/world links for each object on display.

The museum also contains the *Riesco Gallery of Chinese pottery and porcelain*, and a *Temporary Exhibition gallery* of 240sqm with 3 changing exhibitions each year.

This experience is particularly interesting because:

- It involves putting people not objects first, and is primarily concerned with access
- It integrates marketing and interpretation skills with traditional museum roles
- It empowers local people with an active role in development, creating a strong and wide client base
- It changes the emphasis of the role of museum staff from scientific object career, to listeners to people, interpreters of objects, and project managers.
- It relies on quality multimedia access to objects and information

## **Strategies toward the public**

Market research is a continuous function fundamental to the development of Croydon Museum. In the development phase Croydon commissioned extensive qualitative market research by the Susie Fisher Organisation on aspects of the proposed museum and attitudes among Croydon people to the past and to museums. This research helped staff to select and prepare the displays which were therefore people not object led. The researchers were briefed to work with groups of people considered least likely to visit a traditional museum as well as control groups of museum visitors.

The key points that came out of this research included:

- Traditional museums were seen as boring by both users and non-users: users had a greater sense of duty about going. The word museum had negative connotations.
- Croydon was not seen as having a history worth finding out about.
- Groups who are not usually well represented in traditional museums - women and minority ethnic groups - wanted to see their history integrated into the main displays, not separated out.
- The new exhibitions would need to be promoted through concepts like fun, discovery and creativity in order to attract. Presentational style needed to be warm, welcoming, surprising and sociable. Interactivity was highly valued.

There must be clear links between each visitor's experience and the displays. Links between past and present should be made. Displays should be challenging and not simply reproduce everyday life.

More recently, the museum has undertaken further focus group research, once again with the Susie Fisher Organisation to test plans for the renewal of the Lifetimes gallery and to test exhibition topics for the changing exhibition programme. Both display planning and marketing are grounded in the knowledge of potential visitors attitudes that this research provides.

## **Marketing methods**

- *Print*. The displays within the Clocktower are marketed as part of the complex as a whole through the Clocktower Marketing Officer. The key publication is a bi-monthly events guide to the centre with full listings of exhibitions and events.
- *Internet*. All museum exhibitions and activities are promoted on the museum web pages hosted through the community web site for Croydon, *Croydon Online*. [www.croydon.gov.uk/online](http://www.croydon.gov.uk/online) E-mail enquiries are encouraged. The museum staff are currently learning to edit their own web pages so that they can develop an appropriate house style and evaluate user response. Staff are also making links to other relevant sites and gateways such as the 24 Hour Museum, the initiative of the Campaign for Museums, a national lobbying group.
- *Educational*. The Museum Education Officer produces a newsletter to schools, *Connections*, which goes out to 1,800 schools and educational institutions in the south east, three times each year. Teachers are invited to a special open evening for each new exhibition and all probationary teachers in the borough have a training session on the services which the museum offers to schools. The museum sends out educational mailings in partnership with their Founder Patron Connex South East (the rail company that runs trains in South East England) and attends educational travel fairs. The Museum Education service has also commissioned qualitative research on aspects of its service, including the use of the Riesco Gallery children's website by schools, and the barriers to secondary schools' use of the museum. This has been used to develop and market appropriate services.

- *Events programme.* A varied programme of public events connected to each exhibition and to themes in Lifetimes is used to create special reasons for return visits to the Clocktower. These are frequently family learning events aimed at children with their carers. There is also a regular monthly programme of under 5s activities, a weekly crèche and Clocktower children’s events promoted jointly through the TicToc Club with Libraries and Arts.
- *Press.* The Museum works through the Clocktower Marketing Manager with a freelance press agent who is commissioned to promote Lifetimes, the events programme and each temporary exhibition.
- *Advertising.* The Museum has recently launched free entry to the Lifetimes gallery with a poster and flyer campaign designed by Oxygen, a design company, to our brief. Flyers were distributed in local newspapers throughout the borough. Each temporary exhibition has its own marketing plan which can include: Poster advertising locally, on the regional train network or on London Underground. Local radio advertising. Adverts in appropriate regional and national magazines. Local press advertising. Print campaign

The audience

The museum seeks to market itself to everyone who lives, works or visits Croydon.

Individual temporary exhibitions are marketed to a regional audience. The museum’s aim is to provide equal opportunities for everyone in Croydon to take part in service activities and to enjoy the galleries, and to enhance Croydon’s image regionally, nationally and internationally. (See Croydon Museum and Heritage Service Access Policy)

The museum has built an audience which is becoming broadly reflective of the demographic profile of the borough as a whole, and it is well used by schools from the borough and from the region, and by families, two important target audiences.

Visitor surveys suggest that Croydon Museum Service has gone some way to meet its aims in developing a wider visitor/user base than traditional museums. There are still areas in which improvement is needed, such as services to visitors with disabilities, to young adults and to some sections of the local Asian communities.

Visitor comments and interviews with researchers, as well as anecdotal evidence from staff, suggests that Lifetimes is effective in representing the diversity of Croydon and offering an empowering reading of personal experience, but this is mediated by the expectations with which visitors arrive. It is sometimes difficult for visitors to identify that there is representation of Black or Asian experience, for example, although images are prominent. There remains a continuing need to promote and introduce the gallery because it cuts across accepted stereotypes of what a museum will be.

Annual attendance and main characteristic of the public

Croydon does not calculate one overall figure. The museum records attendances at Lifetimes, the Riesco Gallery and temporary exhibitions separately. The numbers cannot be added as they include many of the same visitors on a joint ticket.

Attendance at the Riesco and Lifetimes galleries has been as follows;

	Lifetimes	Riesco	TE
April 1995 to March 1996	32.805	46.039	55.625
April 1996 to March 1997	38.338	34.811	50.668
April 1997 to March 1998	40.541	71.556	30.320
April 1998 to March 1999	28.580	45.579	14.180



In common with all other local authorities in the UK Croydon counts from the beginning of April to the end of March not the calendar year.

#### Place of Origin

*Lifetimes* is attracting between 51 and 63 % of its visitors from within the borough of Croydon. The majority of the rest come from within London and the Southern Counties of England. Less than 10% are visiting from the rest of the UK and between 1 and 4% come from abroad.

#### Return Visits

26% of those surveyed were making return visits.

*Temporary Exhibitions* are attracting a roughly similar profile of origin with the exception that they are, as planned, enticing noticeably higher numbers of Londoners to attend. There are considerable variations according to the subject.

#### Gender

*Lifetimes* is attracting considerably larger numbers of females (from 56–71%) than males (from 29-44%) *Temporary Exhibitions* once again exhibit a similar pattern of a gender divide while certain exhibitions notably Monster Creepy Crawlies and Fantasy Football league attract more men than women.

#### Age profiles

*Lifetimes* is attracting a fairly typical age profile, with gaps in the young adult group, and very impressive initial numbers in the 50 to 74 age group that were not sustained ie they did not make repeat visits. *Temporary Exhibitions* on the other hand demonstrate the museum's success in targeting children with some shows, and adults with others.

#### Ethnicity

Croydon Museum is attracting a number of people with different ethnic backgrounds but not yet in numbers equivalent to the profiles within the borough as a whole. Certain temporary exhibitions targeted at particular groups have been very successful. Certain groups, some Asian groups in particular have been underrepresented and need targeting.

#### People with disabilities

The figures where available (between 50 and 60% of those surveyed declined to answer these questions) are too crude to draw conclusions except that more detailed targeting and monitoring will be required.

### **Market surveys and policies towards the public:**

The initial market research has been mentioned. Considerable further qualitative work has been done since. An annual visitor survey is carried out each year.

In 1998-9 a review of barriers to access was carried out following the identification of under-use by people with disabilities.

The museum has written its own policies for Education, Marketing and Access. Croydon has a marketing manager for the Clocktower complex and the museum is working with her on a strategy for the centre as a whole.

There are corporate guidelines (i.e. Croydon Borough Council's guidelines) for Press and Public Relations work which we follow, while defining our own strategies.

### **Policy development**

Croydon is typical of English local authorities in that responsibility for policy is divided between the museum and the governing authority. Thus Croydon Museum writes its museum education policy (developed by the staff team led by the education officer) and access and marketing policies (developed in the same way as a team with a lead officer) within the overall aims and guidelines written by the borough.

There are no departments – the museum is too small – but Croydon Museum has 2 dedicated Education staff, one dedicated Development Officer responsible for marketing and fundraising, while the Clocktower employs a Marketing Manager and a freelance Press and PR consultant for promoting the museum service.

## **Further Essential Information**

### Successes to date:

Lifetimes is an award-winning, high profile museum which has changed perceptions of what a local history museum can achieve by successful integration of new technology with community participation.

It won the Interpret Britain Award in 1995, the IBM National Heritage Multimedia Award in 1996, and was runner up in the European Museum of the Year Award in 1996.

Touch screen computers are used to weave together objects, real stories photographs and film, enabling visitors to explore the history of Croydon through the lives of local people of different ages and cultural and social backgrounds.

The museum has built an audience which is broadly reflective of the demographic profile of the borough as a whole.

The museum has achieved good visitor figures through offering high quality changing exhibitions and events.

The museum education service is used by schools throughout the borough and the region. Over 2,500 children visited Lifetimes in school groups last year, and 77% of local schools have visited since it opened.

### Aims in the next 3-5 years:

- To replace Lifetimes with an up-dated, expanded gallery incorporating the things we have learned from visitor research.
- To get the resources of the museum on-line in an accessible, user friendly form.
- To increase the interactivity and community participation in the new gallery through on line access and outreach projects linked to the gallery.
- To develop partnership working with other organisations, such as Housing and Social Services, to increase the museum presence throughout the borough.
- To expand our touring exhibitions network to include more partnerships with museums in other countries.
- To build the regional and national profile of the museum.

### Funding

Revenue budget from London Borough of Croydon, Leisure Services Dept. 1999-2000:  
£484,384 pounds sterling

Additional income targets are raised from admission charges, sponsorship, grants, exhibitions hire fees, rent on heritage properties and charges for services.

In 1999 the Council voted to remove admission charges from Lifetimes, in line with the UK Central Government Policy, and agreed to raise the museum's revenue budget by the amount usually obtained, which the museum has used and continues to use to market the gallery.

A corporate patronage scheme was established, but it is generally felt that it has not been an enormous success apart from the assistance in kind activated by Connex South East a founder patron. The scheme is under review.

#### Current major project

The museum is now planning the *Making Connections Project* for the renewal of Lifetimes and a major lottery bid (to the Heritage Lottery Fund in receipt of profits from the UK national lottery) has been submitted. The temporary exhibition programme is being evaluated and Croydon is about to undertake further market research on future proposals.

Lifetimes requires updating if it is to retain its position as a market leader. It is now urgent as the company that developed the multimedia has gone into receivership and the museum is now unable to update information or to access the digitised resources from which to create a new programme.

# Deutsches Museum München

by Raymund Kastler

## **Innovative key-points:**

- Overcome of funding and personnel deficits by unconventional partnerships and flexible crisis intervention through the management, despite being embedded in the system of public administration
- One of the first European museums to use volunteers in different departments of the museum, new form of international private public partnership in the project Chemistry for Life.
- Flexible reaction of the management to a changing social and economic surrounding, despite of the fact of being embedded in the public sector and a high ability of self-organisation
- Both elements the use of volunteers as well as the new forms of private public partnerships in the development of museums exhibits are highly transposable to other sorts of cultural institutions

## **Short description:**

The Deutsches Museum München (German Museum Munich, abbreviation DMM) was founded in 1903 by Oscar von Miller as a museum for science and technical history supported from many collectors in Germany and abroad. Through the years of its existence and despite nearly total destruction of the museums buildings in WWII the DMM achieved a high reputation as one of the leading science museums in Europe with 18.000 objects from 46 different sections of Science and Technology presented on 45.000 m<sup>2</sup> display rooms and another 60.000 objects in specialised study collections.

### The museum today consists of:

The main complex on the so called Museumsinsel in Munich

The Kerschensteiner Kolleg, an institution for adult education in Science and Cultural History

The Researchinstitute for the History of Science and Technology

The Forum der Technik, a commercial profit centre with Imax Cinema, planetarium, congress and seminar rooms as well as exhibition space

An permanent exhibition hall at the former aircraft-wharf Schleißheim since 1993

The History of Traffic Centre of the DMM, under construction in the former exhibition halls of the Munich Fair

The Deutsches Museum Bonn, a branch museum since 1995

Being a public institution, the reduction of public expenditures in last decade have also affected the DMM. To avoid the closing of different departments due to additional cutting of personnel the museums director decided in 1996 to inform the public directly about the crisis and called for volunteers. This action achieved a broad publicity and raised around 50 volunteers enabling the DMM not only to keep all the exhibitions open but also to minimise the closing times of the museum during the public holidays to just eight days.

In the same year a complete analysis of the DMM's structures was made by the management consultants McKinsey uncovering deficits in the display of more recent scientific and technological findings, that the development of the research department into an university institute had stopped half way, that there were fundamental lacks in PR and Marketing as well as in scientific and museological co-operation.

To overcome these deficits and in view of the centennial of the DMM, in 1997 a basic strategic paper «visions 2003» was created accompanied by McKinsey as consultants, in order to find new

ways for the 21<sup>st</sup> century. The paper was based on an open discussion with all employees, the members of the advisory board and the museum administration.

A clear philosophy- mission statement, which devotes all the museum's activities, including the canonical collecting, researching, preserving, to the interests of the visitors, was formulated.

Based on the mission are the following objectives of the DMM:

- To enhance the understanding of Science and Technology as part of our culture on the base of important topics and to improve their discussion
- To demonstrate the historic development of Science and Technology, their current importance and their mutual influence on human society
- Being an independent institution the DMM discusses also controversial topics in Science and Technology and offers a platform for the exchange of ideas and views

Essential items of the new strategy are:

- Exhibitions: the creation and enhancement of popular, plurithematic and entertaining exhibitions; creation of satellite museums (e.g. Museum for Traffic and Transport)
- Collections: defining a clear collection policy with a collections management system
- Research: intensification of object based research, integrated in the museum's life at a scientific excellency
- Marketing: visitor orientation in all activities, though it is a truly scientific attitude that has the final say
- Funding / organisation: to look for new sources of income through partial privatisation, temporarily lease of exhibition halls for events, merchandising (e.g. a CD-ROM Catalogue «Deutsches Museum - Offline» with 800 pages, 750 pictures, videos and music presenting a virtual walk about through the collections), creating of an Foundation Trust of the DMM, external placing of orders and installation of project management in all central areas.

In order to enhance the economic and efficient use of the financial resources instruments of planning and controlling are being installed.

### **Interaction, co-operation, partnership:**

Among a lot of temporary or semi-permanent co-operations with Science Museums, Universities and Research Institutions, Government bodies and private enterprises (e.g. the co-operation for the DMM internet Web-site and the CD-ROM Catalogue Production «Deutsches Museum - Offline» with BOSCH enterprises, Germany) the following are especially noteworthy:

- The Munich Centre of the History of Science and Technology

Based on a existing co-operation with the institutes of the history of science and technology of the Technical University and the University of Munich and enlarged by University of the Federal Armed Forces as associated partner the Munich Centre of the History of Science and Technology at the DMM, provides an inter-university education with PhD, MA and in future also BA graduation. These collaborations are incorporated in the Post-graduate College (Graduiertenkolleg) and the Special Research Section.

In addition many of the curators give lectures and carry out research projects in universities.

This co-operations provide a pool for concentrated scientific advice, sophisticated equipment, speakers ( e.g. as 'scientist to touch'-lecturers) and motivated young students sensibilised for the DMM's issues.

- Technology, Museum Collections and Material Culture

After the abandonment of the DMM's own yearbook it was decided to publish a first rate book series in collaboration with the Science Museum in London and the National Museum of American History in Washington called Technology, Museum Collections and Material Culture.

- ChEMistry for Life under the protection of ECSITE

Currently the DMM is interacting in the «ChEMistry for life» co-operation (ChEM = Chemistry in European Museums project) , being a new model of interaction between partners from different public private backgrounds.

#### **16 Science Centres:**

- Catalyst, The Museum of Chemical Industry, Widnes, UK
- Cité des Sciences et de l'Industrie, La Vilette, Paris , France
- Deutsches Museum, München, Germany
- Experimentarium, Hellerup, Copenhagen, Denmark
- Exploratorio, Coimbra, Portugal
- The Exploratory, Bristol UK
- Heureka, Vantaa, Helsinki, Finland
- Fondazione IDIS - Città della Scienza, Naples, Italy
- Institut Royal des Sciences Naturelles de Belgique, Bruxelles, Belgium
- newMetropolis, Amsterdam, Netherlands
- Museu de la Ciència, Barcelona, Spain
- Musée des Sciences de Parentville, Charleroi, Belgium
- MUSIS, Rom, Italy
- Palais de la Découverte, Paris, France
- Science Museum, London, UK
- Techniquet, Cardiff, UK

#### **14 partners from the chemical industry:**

- Akzo Nobel NV
- The British Petroleum Company PLC
- DSM NV
- Elf Autochem
- ICI
- KT RY Kemianteollisuus ry
- Montell Poleofins bv
- Neste OY
- Norsk Hydro ASA
- Rhône-Poulenc SA
- Shell International Ltd
- Solvay
- Union Carbide (Europe) S.A.
- Verband der Chemischen Industrie V.C.I

The general aim of this initiative is an attractive up- to- date presentation of the cultural achievements of chemistry and the outlining of an objective view on the chances and risks of modern chemistry in order to decrease misunderstanding and ignorance towards chemistry by an joint campaign mounted across Europe under the umbrella of ECSITE.

In 1994 the project «ChEMistry for Life» was founded by the DMM. Focused on eight global themes the initiative should demonstrate the multiple aspects of chemistry, called the «global message» by W. P. Fehlhammer, R. Jackson and J. Wagensberg. The launch event happened 1997 with 14 exhibition modules on show in Brussels.

The projects objective is the realisation of 50 «hands on experiments», computer simulations, lab/workshops, and show/demonstrations etc. by the year 2000, reaching from a laboratory for criminalistic techniques to hydrogenrockets. Each museum develops and builds its own specialities that are exchanged, so both human and financial resources of each partner are used. This conception saves costs and guaranties a general high standard in the presentations. By the year 2000 the exhibits are going to be distributed to more than 100 Science Centres within ECSITE.

The financial means for this project initiative are sponsored by the European Commission and the Chemical Industry.

- Theatre in the Museum in co-operation with the graduation course of the Falkenberg Theatre School. The co-operation 'theatre in the Museum together with the graduation course of the Falkenberg Theatre School was initialised by chance through the stage manager and director of the school in search of requisites for G.Hauptmans 'Weavers'. Finally the graduation course played in the textile technique collection of the DMM. This co-operation will be continued in the future with other projects.
- In order to use all the museums resources and to attract new market-segments of visitors the DMM staged a series of classical concerts with instruments from the collection of historic instruments e.g.; Organ Concerts with Karl Maureen together with merchandising the events through CD production and on the radio (e.g. with the Italian radio station RAI 3).
- Co-operations with art-institutions at the former aircraft wharf Schleißheim as part of the exhibition co-operation programme Arts and Technics (Kultur & Technik): In 1997 'Flugskulturen' by Chr. Bergmann were displayed, or recently works of Paul Klee (Exhibition 'Und ich flog') uncovering that the cryptic signs and symbols of his later oeuvre, originated in his wartime experiences, especially crashing aeroplanes, balloons etc.
- Additionally the DMM offers consulting to other museums like in Egypt, Tunisia and Japan

### **Institutional engineering:**

The DMM is an self regulatory institution of public law with legal capacity, defined by its own articles of association under control and protection of the Bavarian State Government (fulfilled by the Bavarian State Ministry for Science, Research and Art)

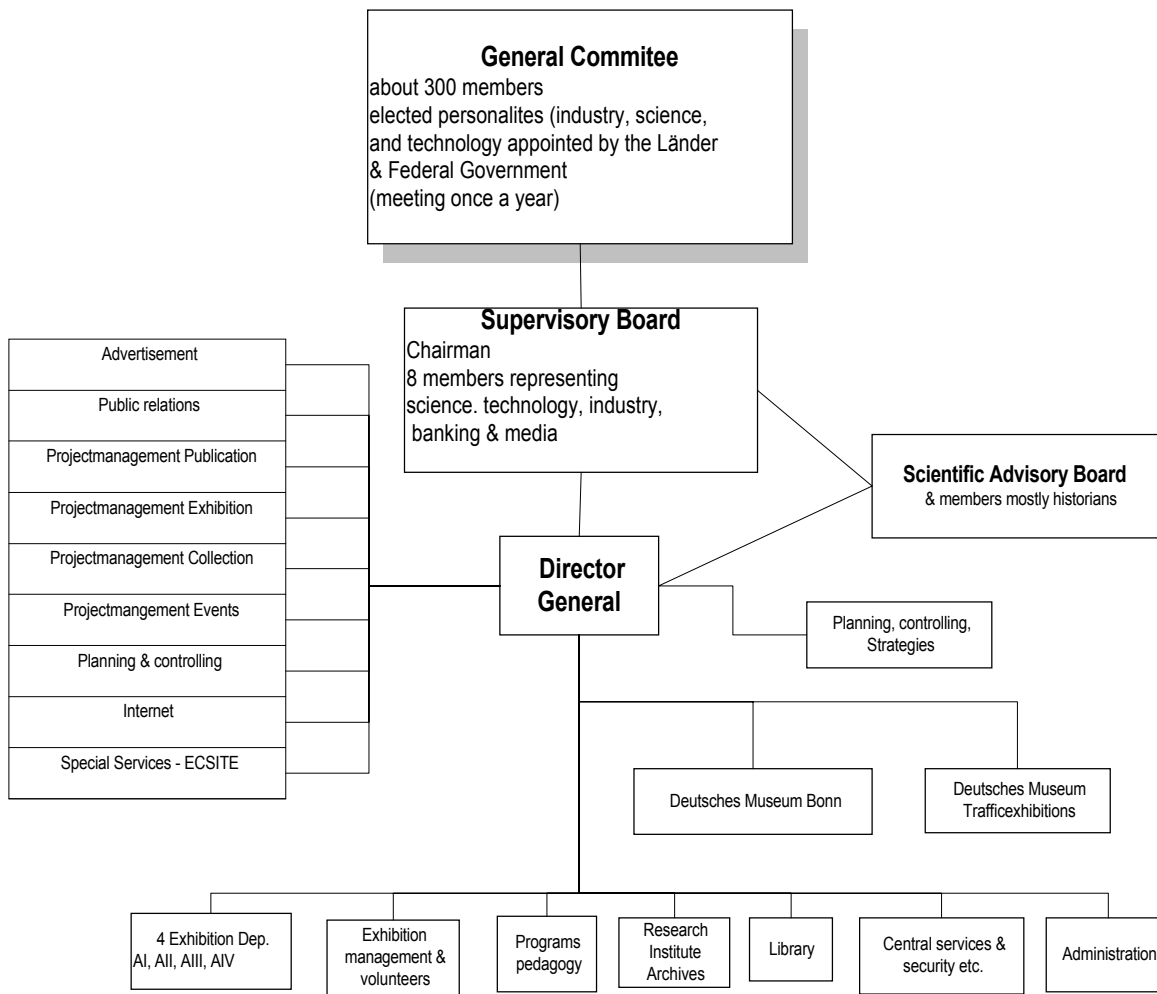
Therefore the DMM is incorporated in the Structure of the Public Administration.

The main aim of the directorate is the reorganisation of core- processes and the transformation of the organisational structure from big units towards smaller teams. The installation of a staff department for planning and controlling allows for the first time systematic mid- to long-term-planning, backed by an unified internal report system and a modern decision-orientated accounting system.

The retirement of six from eleven directors by the year 2003 will be used for further reorganisation.

This process is documented by the high amount of staff divisions as shown by the organogramm. Additional staff divisions are created in order to special project demands.

The following executive bodies exist according to the DMM's articles of association



There are separate Departments for Internet-presentation, Fundraising and Volunteers. For large exhibitions the one-curator responsibility was replaced by transient teams of internal and external curators and other skilled external personnel instead in order to produce more holistic and plurithematic exhibitions. Finally the curator position in the DMM has drastically changed from a multi-skilled universalist to a specialist position in a multifold team. The way from the first idea to the final exhibition is organised with a standardised flow plan according to the standards of project management.

One of the core innovations in the DMM is the use of volunteers. Despite of the fact that volunteers in museums and other cultural institutions have been installed very successfully in the USA and also to lesser extent in the UK, continental European cultural institutions have been reluctant to use this source. Three years of successful use of volunteers in the DMM proof this step an appropriate one.

A written volunteer-application is followed by personal talks with the museums-management and the co-ordinator for volunteers. The rights and duties of the volunteers are outlined in a special contract, formed on the base of the DMM still being part of the public administration. This facilitates mutual relations. According to the contract four days minimum service per month are agreed. In order to remunerate expenditures 30 DM per month out of donations are paid.

The structural personnel shortcuts of the DMM are partly balanced through the volunteers (currently 56) and additional around 50 students. Five volunteers being the equivalent to one employee. A slightly higher expense in co-ordination and administration is managed within the



existing structures. Volunteers are not only used in the guard and guide-services but also in the press office or the Kerschensteiner Kolleg.

The relations between the employees and the volunteers have in the beginning been overshadowed with irrational fears of jobless. Open discussions with employees, volunteers and the management solved these irritations quickly.

The DMM has an annual Budget of about 50 Mio DEM. The DMM is funded by the Federal Government with 15% of the budget = 5.8 Mio DEM and by the Bavarian Freestate Government with 85 % of the budget = 27.3 Mio. DEM. The City of Munich grants 1 Mio DEM.

A direct income is generated through entrance fees, the self responsible lease of the restaurant, the Internet Cafe, the museums-shop, membership and through donations and sponsoring adding another 10.1 Mio DEM to the total Budget.

The amount of income through sponsoring is sought to be enlarged in the future. In order to facilitate and professionalise fundraising a specialised department with a fundraising datasystem has been installed for the centralised registration and co-ordination of fundraising activities. The rights of the sponsors are rather restricted. Apart from mentioning the Sponsors name, logo or product placement, there is also the possibility of special presentations of the sponsors funded by themselves.

### **Policies towards the public:**

According also to the DMM's objectives the museum is not only devoted to public education and scientific research but to customer orientated service. The current exhibition design is designed as public orientated as possible with around 2.500 interactive or 'hands on exhibits'. The new media are systematically used in all the new or reorganised exhibition halls.

Internet: The well organised and extremely rich museum web site (alternatively in German and English), besides a lot of well structured information about the museum, its history, the structures and persons in charge and the articles of association hosts links to all its departments (with contact email addresses for requests) branches like the Deutsches Museum Bonn (a quite independent branch museum with own exhibition programme and web site), the exhibition centre Aircraft Wharf Schleißheim (near Munich) and the Kerschensteiner Kolleg, the DMM's own institution for adult education and advanced training.

Additionally the Web-site provides a virtual tours through all the exhibition departments, incorporating interactive technical and physical experiments, videos and selected music samples. Currently 700 hits per day (maximum 1205) show a great acceptance of the internet presentation.

An other important platform for communicating with the public is the DMM's Kerschensteiner Kolleg for advanced training and adult education. The topics of the one week seminars or the international summer school reach from the different departments of Sciences and Techniques to current events, like the sun-eclipse or environmental topics (e. g. recycling, or the so called hothouse effect). Other important fields of training are specialised courses in museums-management. Target groups for these seminars being teachers, employees of museums, technicians, scientists and students, as well as the interested public. The seminars being individually designed according to the interests and needs of the participants.

Additionally the Kerschensteiner Kolleg together with the Munich City adult education department offers thematic weekend events like workshops on alchemy or practical experimental works in different techniques, like sun-energy. These events are specially designed for families, children and young people. The involvement of youths in the DMM is enhanced by different technical and scientific projects realised by groups of pupils, presented by themselves in the DMM.

An intensified medium or even long-term communication and identification with the DMM is achieved through the association of the members of the DMM (currently around 14.000), offering a lot of additional services and information.

In communicating with the public or the museums customer the volunteers do play an important role. Through competent information, partially based on personal experience (e.g. an retired airforce pilot explaining «his» aircraft) a high degree of visitor orientation and integration is achieved.

The classical means of PR and advertisements have in the last years been reinforced with marketing instruments like sales promotion, enhancement of public awareness and special events in order to meet a slight decrease in visitor numbers. (1984: 1.4 million compared to 1997: 1.2 million). The installation of a specialised marketing department is already projected, but due to financial and personnel shortfalls has not already been realised. While a press-office exists since the founding of the DMM, the department for advertisement has been separated from the press-office only in 1998. Classical advertisement is connected with special events like a Metal Festival (in 1994 with 50.000 visitors a day), the Bridge Building Festival (1998) or a Wood Technology Festival (1999).

Regular visitor analyses are used to work on the different target groups

According to regular visitor questionnaires the typical DMM visitor is young (under 20 years and younger), male and interested in Techniques. Higher education is tendentially over-represented. Geographically the visitors come to  $\frac{1}{3}$  from southern Germany,  $\frac{1}{3}$  from the rest of Germany, and  $\frac{1}{3}$  are foreigners. Around 25 % are frequent visitors of the DMM.

The visitor analyses demonstrate clearly that besides the main target groups: families and youths, there are deficits in the sections women and elder people. These deficits are tried to overcome by especially designed activities.

A special department of the DMM called «Programs», especially designed to meet the spreading diversification of the museums public, is devoted to museum pedagogics and education, guide-services and lectures. This department has developed from the DMM's own educational institute and the department of publications step by step through enlargement of activities.

### **Policies towards the staff:**

The DMM has currently 355 full time employees (reduced from around 400 due to job reductions in the public sector). The use of volunteers, students and trainees enabled the DMM to bridge this gap. The organisational structures with the different departments and their interactions are shown in the organogramme above.

Due to being a self regulatory institution of public law with legal capacity under control and protection of the Bavarian State Government, the DMM is incorporated in the hierarchical structures of Public Administration's staff structures. According to the Bavarian Personnel Administration Law (BayPVG) there is a staff association, dealing mostly with staff matters, to lesser extent as a discussion-forum for contents matters.

To strengthen the flow of information in the DMM, an internal information-series has been started in 1998 to inform all the employees about new projects, decisions and alterations. These information sessions are also platforms for discussions and feedback between the management and the staff.

Special team talks ( e.g. demonstrators and curators) and participation of the relevant qualified personnel in talks with members of the advisory board or representatives of the industry are regularly held.

For the creation of the strategic paper 'Vision 2003' for the first time employees of all different levels and departments engaged themselves together in project-groups in order to develop the new philosophy and mission statement.

The Museum, being an enterprise with highly specialised jobs, is doing a lot of training on the job, despite the fact that the employees have specialised education. Additionally there are advanced staff trainings in tour-guiding, didactics, pedagogics, foreign languages and other additional qualifications. A specialised course in museums-management is also offered to customers from outside the DMM.

Special care is given to the practical training of interpreters (or demonstrators) in the so called Munich Model for Interpreters and Demonstrators Education (Münchner Modell der Fortbildung von Vorführern und Aufsehern), who have to deal with around 80% of all demonstrations and guided tours in the museum and fulfil their duty rather independent. In order to demonstrate the technical exhibits future demonstrators are expected to have a fulfilled apprenticeship in a technical trade. The required specialised technical training is supplemented by holistic and integrative education in two fields: didactics (pedagogics, rethoric) and psychology (conflict management).

This specialised training, offered also to customers outside the DMM; is based on a situate seminar design with plenary sessions as well as work in small groups.

Practical training of trainees (currently around ten positions with around 300-400 applications per advertisement) is another important task. The period of training is two years, resting on five columns: museology, exhibitions, collections, conservation, research and administration.

## **Dutch Digital Heritage Association (DEN)**

A digital future for cultural heritage in the Netherlands

Judi Caton

### **Innovative key-points:**

DEN has been set up to lead the development of digital accessibility of cultural heritage in the Netherlands. It is a truly ambitious scheme, at a national level, with the intended outcome of making cultural collections available on the internet to a very wide public.

DEN is very similar to SCRAN the Scottish Cultural Resources Access Network established in 1995 with a mission is to create a fully searchable resource base of Scottish material culture and human history. Both countries are leading the way in Europe in this field.

DEN and SCRAN are collaborations of museums, archaeological services, libraries and monuments, networks of subscribing member organisations working in partnership in the interests of improved research and improved public access.

Both of these national projects are important examples of the high level of collaboration and networking required to enable cultural institutions to meet the needs of the markets for digitised information.

Both offer potential models for co-ordinating cultural information and establishing on-line access to information in all the media available – written records, images, video, sound tracks, spoken memories and the like – and at a national level.

Both, too aim to provide specific on-line information and services to different market segments.

### **Institution and Funding**

DEN is established as association, a membership body, and most major institutions in the Netherlands are in membership. The members include museums, libraries, monuments and archives.

DEN is run by a Bureau, with a lean staff of 3 consultants.

About 25% of DEN's funding comes from its members and 75% from the Dutch Government and this last is guaranteed for 4 years.

### **Main Aims and Activities**

DEN is a very young initiative set up in response to the need to coordinate cultural information in preparation for digitisation, and to bridge the gap between cultural institutions and the new digital market.

DEN is not intended to scan or enter data itself, rather it will give advice in information management and planning to the whole range of member cultural institutions

DEN will also be concerned with defining user groups of the new digital information and catering for these groups. Thus DEN will ensure the digitised information is prepared in order to meet the needs of particular market segments.

DEN will coordinate standardisation initiatives and the adoption of thesauri in the Netherlands. In order to achieve standardisation DEN is seeking to turn MUSIP into a national project. MUSIP has been a pilot project in the province of Utrecht for the registration of museum collections on a basic general level with some important additions: keywords, themed groups, and a general condition survey.

Standardisation will be crucial for DEN's major project the Netwijzer Cultuur – Web Guide for Culture WGC.

SCRAN too is focusing on the digitisation of cultural collections.. It aims to work with project partners such as museums, galleries, archives and universities to digitise selected parts of their collections. There are over 200 projects underway and material is being added to the resource base daily. It aims to provide the people of Scotland with easy multi-media access to Scottish history and culture. By the Millennium, SCRAN intends to provide access to 1.6 million text records of historic monuments and of artefacts held in museums, galleries and archives, plus 100,000 related multimedia resources. In addition, SCRAN will have commissioned 100 multimedia essays, based on these resources.

SCRAN is achieving this by awarding grants to participating cultural institutions, as well as advice and coordination, and by commissioning multi-media work.

### Digitisation of collections

Most museums in the Netherlands have started a digital registration project. Some are well under way and some are complete. Not many of them though have digital images available, and not many are utilising accessibility tools such as thesauri.

This is a common picture in Europe, where the development of true multi-media projects with public access has recently been stimulated through a number of important Raphael and other EU funded projects. Most of these though have been on particular themes and partnerships between cities, or groups of institutions with similar collections., digitising all records about eg prehistoric boats or medieval costume.

DEN's work and that of SCRAN, to coordinate institutions of an enormous variety containing the full gamut of material culture, and to prepare a centralised national record is both more ambitious and more important.

See SCRAN's web-site for a demonstration of the multi-media material they are making available.

<http://www.scran.ac.uk>

There are 2 general access points to material made available by Dutch Museums. See

<http://www.hollandmuseums.nl>

<http://www.museumserver.nl/>.

### A Major project for DEN: Web Guide for Culture

The WGC will include:

- Yellow Pages – all institutions keeping cultural heritage
- A Cultural agenda for these institutions (both of these sections will be developed and managed in cooperation with the National Bureau for Tourism)
- Collections and other source material information based on MUSIP tyoe records
- A background information layer with short introductions, presentations and papers
- A metadatabase, providing access to the on-line collection information systems of a s many institutions as possible, through an intermediary indexing tool (this will be developed in 2001 if the funding is forthcoming)

### Policies towards the Public

One of DEN's expressed tasks is to define target audiences and to tailor information to those audiences. Several groups have already been defined as potential users – cultural tourists, the education audience and subject specialists as well as a more general Dutch public, and the intention is to design access to the information especially for them.

SCRAN too, as is clear from its web-site has identified similar users and is offering separate paths of access, and different services to different groups.

SCRAN explains that digitised resources relating to cultural topics are currently difficult and expensive to acquire. Without these resources, those wishing to teach, study and enjoy the culture of Scotland will, by the millennium, be significantly disadvantaged. SCRAN will address this.

Both DEN and SCRAN are to be available to the public in a wide range of community information

points, including schools, libraries, museums, community centres and tourist information centres, as well as in the home. They will be accessible via the World Wide Web and their resources will also be available on CD-ROM and other multimedia formats as they develop.

Neither DEN nor SCRAN has reached the stage where evaluation of the use of digitised information can be assessed. Will on-line access, for example, stimulate the use of cultural collections by individuals in the Study House project in the Netherlands? How will this be assessed? How too will the value of SCRAN as a resource for the National Grid for Learning in the UK be judged? Will internet and multi-media access bring new users? How will we know?

DEN and SCRAN are setting out to bridge the gap between cultural institutions and their users. Evaluation of the quality of experience by different user groups of the public interface will be vital.

# **Heritage Island**

## **Ireland's Heritage Marketing Group**

Giovanni Festa Bianchet

### **Innovative key-points:**

- the only marketing organisation in Ireland dedicated to the promotion of Ireland's major attractions and heritage Centres;
- played a major role in establishing "heritage" as a major reason to visit Ireland. Influenced Tourist Boards' Strategy to feature Heritage more visibly in all overseas markets promotions;

In terms of interaction, cooperation, partnership the consortium is an example of cooperation between private and public sectors, and provides a potential mechanism for private investment to further expansion in the Tourism Industry. Representing 51 heritage Centres throughout Ireland, Heritage Ireland functions as a national marketing/promotional mechanism which provides:

- a strong identification through a design/brand approach which, supported by HI's reputation as an integral and valued service to the travel trade, both in Ireland and abroad, acts as an easily identifiable mark of quality and a linkage between the individual Centres that are its members;
- an efficient single source of information with marketing clout as a result of joint promotions (e.g. single national brochure, tour operators manual and education tours directory) especially in respect to overseas Tour Operators, by-passing the limited marketing experience and resources of the individual member Centres;
- a single focussed representation at trade fairs, workshops etc.;
- a central resource for P.R. opportunities and for referral to individual members;
- a distribution system for sales literature of single members;
- facility to influence coach tours itineraries and special group programmes;
- cooperative marketing arrangements with the accommodation sector
- ability to organize itineraries of familiarisation trips for Travel Trade and Press;
- response capability to deal with guidebook writers and Travel correspondents.

In terms of policies towards the public HI has developed an innovative program to serve its publics.

HI brand name has the reputation of representing most of the prestigious cultural Centres in Ireland, providing marketing benefits to its members;

- an image creation campaign that exploits the uniqueness and activities of its members, with strong appeal to those who want entertainment, inter-action and new experiences;
- a website targeted at both the consumer and to the Tourism trade, providing them with quick and easy access to information on member Centres;
- bimonthly newsletter mailed to major Tour Operators, Carriers and the Tourist Board Offices to keep them up to date on all developments within the HI;
- full colour attractive all-Ireland Touring Guide aimed at individual travellers, includes the Explorer Card (formerly known as Discount Card), which offers admission discounts and special offers for 2 adults in Heritage Ireland Centres
- Group Organisers and Tour Operators Manual, a planning manual distributed to over 3,000 Tour Operators and Group Organisers all over the world;
- Education Tours Directory, a comprehensive source of information, invaluable to all those planning education tours;

- the cooperative marketing arrangements with the accommodation sector takes advantage of established distribution channel to gain extra exposure for the Explorer Card, thus increasing the profile of its members
- initiated and successfully conducted a major sales and promotional campaign to UK Coach Operators which were touring Europe but not Ireland;
- established many events that promote communication among members and tour operators;
- established successful international and domestic marketing initiatives.

### **Short description:**

Heritage Island Ltd. (HI), a private commercial company established in 1992, is a marketing consortium representing most of the prestigious cultural attractions throughout North and South Ireland. The need for the company was indicated by a feasibility study, commissioned by HI's current Directors, that examined the effect of the substantial increase in Heritage related Centres in Ireland between 1991 and 1993 developed with up to 50 % of the costs covered by funding from the European Regional Development Fund (ERDF). The study indicated that to ensure the survival and success of these Centres a strong marketing/promotional programme and a single marketing organisation dedicated to the promotion of all the Centres was needed. The private commercial company form was chosen over that of a public organisation because it has greater operational independence from and is less vulnerable to government/political pressures, making it more efficient, effective and "faster". However, the public sector played a key role in HI's successful start with a much needed endorsement from Bord Fáilte (Irish Tourist Board) and operating funds from ERDF.

To join HI a Heritage Centre must be: large enough to accommodate groups; worthy of identification as an itinerary stop; unique with a strong and imaginative story-line which will translate onto tourist literature; and have: the ability to take bookings and flexibility for exhibition/entertainment opportunities; qualified personnel to manage tour demands and entertain; and adequate facilities (toilets, cafe, shop);. Setting selection standards (which were recommended by the Irish Tourist Board) to join HI and creating the consortium has not diminished the individual uniqueness of the members but rather has created synergy as a result of the confidence created by the authenticity and credibility that result from such a selection. HI currently has a diverse membership 51 Centres including historic houses, castles, monuments, museums, galleries, national parks, interpretive centres, gardens and theme parks, all of which charge an entrance fee. HI has a Board of four Directors who are shareholders. The Board sets policy for the company after consultation with member Centres. There is also an Advisory Board composed of representatives of different heritage sectors and outside experts which is consulted as a group or individually as needed. Two representatives are appointed each year by the Board of Directors from large and small Centres throughout the country. HI operates from an office in Dublin with three staff members; the Managing Director, Office Manager and a Marketing Executive, while specialists from the travel industry are brought in for project work (see attached Relationship Chart).

### **Interaction, cooperation, partnership:**

HI is an example of planned and mutually beneficial cooperation between public and private sectors. HI was established as a private company made up of and run by tourism and marketing professionals with experience and credibility in the international Travel Trade in an effort to provide the fastest and most effective way to gain the market penetration necessary to establish Ireland as a Heritage destination. However, many of the Heritage Centres that are its members developed with ERDF funds and at its origin HI succeeded only because for the first three years 25% of operating cost was funded was from European or Government sources. ERDF funding



has continued through a 2<sup>nd</sup> programme (which ends in 1999) and HI still receives support but it has progressively reduced to 10% of its operating budget, with the other 90% now provided by Member Fees and sales of the HI Touring Guide<sup>1</sup>.

As a private company HI provides a potential mechanism for allowing private investors to invest in the HI and provide funds for further expansion in the Tourism Industry. Though this has as yet not happened it is a possible future strategy which would allow HI to directly involve private investment in promoting Irish Heritage.

HI seeks cooperative marketing arrangements with other sectors of the tourism industry in Ireland, in particular the accommodation sector. Synergy with accommodation providers is beneficial given that the products (visitor attractions and accommodation) compliment each other as opposed to being competitors. HI is taking advantage of the established distribution channels of selected companies to gain extra exposure for its Explorer Card, thus increasing the profile of its members.

The variety and number of companies that make up the International Travel Trade and their busy annual programme of Trade Fairs make it very difficult, if not impossible, and expensive for the single enterprise to access such programme. Travel Trade buyers or planners prefer a single source for basic information. HI, by uniting Ireland's Heritage Centres into a consortium, creates a "critical mass" which has an impact on market buyers consciousness. Do to the dynamic nature of the industry HI maintains its presence at the various shows not only to cultivate existing ties with tour operators but also to forge new contacts. A large proportion of Tour Operators know and appreciate the service provided to them by HI through its attendance at various international trade fairs and workshops throughout the years. HI sales personnel deal on a personal basis with the Travel Trade planners in the major European markets. In addition the linkage between members provided by HI's joint promotion creates referral business from one Centre to the other. HI has also established many events that promote communication among members and tour operators and present ideal networking opportunities. Among the more successful are the Annual Members' Educational weekend and Members' Conference.

HI's "critical mass" is also effective and efficient in dealing with the domestic market of educational/school, English language schools and Home Holiday/mini break programmes. This market is best tackled through a central sales office rather than by individual operators or on a regional basis.

### **Policies towards the public:**

The main goal of HI is to establish Ireland as a Heritage attraction in the mainstream of peoples perception and, through good marketing, turn that perception into visitors. The result is growth in attendance at the Centres predominantly from foreign tourists (70% of visitors to the Centres are from out of state or overseas), either as part of packaged tours with a long spread of season or individual who are pre-sold the attraction or are directed to it while in Ireland. A secondary but vital market is the educational school tours – particularly as traffic balances the tourist seasonability. Home holiday, off-season short breaks is also a target market when packaged with transport and accommodations. Therefore HI's publics are tourist to Ireland from abroad, Irish who travel within the country, the Travel trade, the Educational sector and the Centres that are its members. HI offers the following initiatives to address the specific needs of these publics:

#### **Tourists (from Ireland and abroad)**

As a special project for the Millennium, HI is developing a **website** targeted at both the consumer and to the Tourism trade, providing quick and easy access to information on member

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<sup>1</sup> There is a two tier membership fees scale with lower fees being charged to member Centres that attract less than 50,000 visitors per year. The HI Touring Guides sell for approximately £2.00 retail.

Centres. Each Centre will have a dedicated page including a hotlink for those Centres that already have their own website. Centres will benefit from being part of a national site which will give them access to new global markets.

A full colour attractive all-Ireland **Touring Guide** aimed at individual travelers. It contains details on all Heritage Island Centres, suggested itineraries (3 to 10 days), and the **Explorer Card** for special offers and discounted admission at all Centres as an incentive to the independent go-as-you-please tourist to visit more Centres. It's distributed through Tour Operators, Regional and County Tourism Information Offices, ferries and directly by the HI office in Dublin. The distribution of the Guide on ferries plays an especially important role in serving the UK independent travelers market (a priority for HI) who bring their own cars and tend to spend more time planning their own itineraries to include a spread of culture/heritage Centres.

Next year HI is taking **full page advertisements** which will list each member Centre with County and incorporate the Explorer Card in the guide books produced by *Town and Country Homes*, an association that represents 1,900 family homes throughout Ireland and by *Irish Hotels Federation*, a national organisation consisting of 1,000 hotels and guest houses. HI Centres will also be featured in the maps of Ireland in the latter guide and the one produced by *Manor Homes of Ireland*, a hotel marketing company that represents 70 hotels nation-wide. These three distribution channels have an accumulative circulation of 765,000 that covers overseas markets, all Irish tourist information offices, many tour operators' self-drive programmes. The additional exposure of HI and the Explorer Card in accommodation guides will further serve the 'go-as-you-please' market both from the UK and America.

#### Tourism/Travel Trade

The above mentioned website.

The bi-monthly HI newsletter mailed to major Tour Operators, Carriers and the Tourist Board Offices to keep them up to date on all developments within HI. Centres are invited to contribute on a regular basis and can supply information to promote special events, new facilities, developments and other appropriate activities.

The Group Organisers and Tour Operators Manual, a planning manual distributed to over 3,000 Tour Operators and Group Organisers all over the world. It contains detailed information on all members of HI, providing a complete and up to date database on the top heritage and visitor attractions in Ireland, both North and South, that serves Tour Operators in their planning requirements. In support of this manual HI offers: brochures and slides on individual sites; professional assistance on itinerary planning and routing for tour series and ad hoc groups; full assistance in organizing familiarisation/educational trips for tour operators staff or agents.

Next year a special "Millennium Ireland" mailshot will target the 800 independent Coach Operators in Britain in addition to the multi-national operators who market extended touring. The objective is to get these operators to market series rather than individual coach tours and to expand their itinerary to include the whole country.

The Irish market is particularly important, but with a high turnover of staff, Incoming Tour Operators need annual briefings of all their planning and operations staff and encouragement to personally visit the Centres. This is undertaken at the Incoming Tour Operators Association workshops and by personal visits to operators' offices. HI also produces a special Tour Operator/Travel Advisers Pass for these staff which is extensively used. Tour Operators are invited as guests to the annual HI Educational Weekend and Members Conference, both include visits to Centres.

HI also offers the following services to the Travel Trade:

a one-stop product information service to all overseas offices including Tour Operators, Group Operators and Tourist Boards' Market offices by supplying them with a full range of HI literature

to service enquiries from trade, consumers, guidebook writers and journalists; and by maintaining a full library of literature and transparencies available on request to Tour Operators (for use in their brochures) and journalists;  
regular servicing and briefings to the staff of overseas Bord Fáilte (Irish Tourist Board) and Northern Ireland Tourist Board offices;  
regular sales calls to priority Tour Operators/Group Organisers and Carriers both at home and abroad - UK, USA, France, Spain and Scandinavia;

### Education Sector

HI has developed Education Tours to member Centres and publishes the Education Tours Directory, a comprehensive source of information that is invaluable to all those planning education tours. It includes details on Centres, education resources, facilities and programmes and Northern Ireland and Republic of Ireland curriculum links. It is targeted with sales visits and mailshots at all schools throughout North and South Ireland, Travel and Tourism courses, language schools, summer schools, specialised educational/study tour operators in Ireland and UK and special interest groups, for example Girl Guides and Boy Scout associations.

### Member Centres

HI has grouped together 51 Centres spanning a wide range of heritage interests to create a marketable image that lends itself to promotion in a national and international context. HI's campaign of image creation exploits the uniqueness and activities of its members, and the fact that they are authentically rooted in the country's and peoples heritage and not "plastic" artificial creations. It is not an image that appeals exclusively to the older tourist or serious student, it has a strong appeal to the generalist and those who want entertainment, inter-action and new experience. It presents Ireland as a heritage destination with a variety of interesting activities throughout the country which offer choice, novelty, interest and enjoyment. The Centres have a historical/educational and entertaining context presented in a style which makes the most of modern exhibition techniques, technology and organisation.

HI also offers the following services which have proved effective as promotional tools for member Centres:

access to a database of approximately 3,500 International Tour Operators, Coach Operators and Group Organisers in list, label or disk format. This database is updated annually and also includes details on tour operators both North and South of Ireland, summer schools, English language schools and schools involved in Tourism Awareness Programmes nation-wide;

the annual Members' Educational Trip is an excellent opportunity to visit other properties within the HI Marketing Group. It also provides an opportunity to exchange experiences on the management of Centres and to promote and develop personal contacts with members of the Incoming Tour Operators Association who also participate in the trip;

the annual Members Conference serves to update HI members on promotional activities undertaken during the past year as well as solidifying the marketing plan for the upcoming year. It is also an excellent opportunity for members to network with Tour Operator representatives who are invited;

an HI representative visits each member Centre bi-annually to ensure that they are updated on current marketing activities.

# Museo Nazionale della Scienza e della Tecnica Leonardo da Vinci

## Giovanni Festa Bianchet

### **Innovative key-points:**

Since 1996 the Leonardo da Vinci National Science and Technology Museum (*Museo Nazionale della Scienza e della Tecnica "Leonardo da Vinci"*) has been implementing a plan to renew both its administrative-institutional and organisational structures.

In terms of institutional engineering the museum is transforming itself from a public entity, under the supervision of the Ministry of Education, into the Leonardo da Vinci National Science and Technology Museum Foundation, a Participated Foundation (*Fondazione di Partecipazione*), which allows public and private sectors to interact in a new way, not only in economic terms but also in the management and the organisation of the museum.

The Museum also represents a new model from the point of view of organisational structure in that it calls for the decentralisation of activities through the creation of departments corresponding to themes of scientific, technological and historic character that will be located outside of the Museum in industrial sites and other museums.

The Museum also presents itself as the fulcrum of a national network of science-technology museums which is making use of the most advanced communication technologies, such as internet, to co-ordinate its actions and to promote and present to the public the activities of the various entities and the diffusion of scientific knowledge.

### **Short description:**

The Leonardo da Vinci National Science and Technology Museum began in 1942 as a Private Foundation - *Fondazione privata per il museo della scienza e dell'industria* – , it was deemed an **Ente morale** (Charity Trust) in 1947, became a state museum in 1958, and is today one of the most visited museums in Italy. In 1975 it underwent a first major institutional modification when it became a Non-economic Public Entity with its own Administrative Council and autonomous administration, under the supervision of the Ministry of Education.

In 1953 the major players from the Milanese public, cultural and industrial sectors participated in the founding of the Museum. The main purpose of the organisation was to take a scientific and technological inventory of Italy which at the time was a predominantly rural society. The change to state museum marked the beginning of a phase of general decline in the institution, caused mainly by the “lack of awareness” by government entities at all levels of what the role of the Museum could and should have been in the context of Milan.

In contrast to this phase of decline, in recent years the Museum has seen a relaunch of promotional activities and presentation of initiatives and events. However, this increase of activities has not been matched by a sufficient influx in economic resources to allow for the effective presentation of its collections.

In 1996 *Assolombarda* (The Region of Lombardy's Industrial Association) intervened proposing a project to relaunch the Museum's role and presence in Milan and re-examine its structure in administrative-institutional and organisational terms.

Through the new institutional asset of the Participated Foundation the Museum takes on the role of the nation's scientific knowledge “factory”, tackling the crucial matter of the relationship between education/training, research and development, and productivity in the science and technology sectors.

### **Institutional engineering:**

On January 1<sup>st</sup> 2000 the Museum will change from a Public Entity to the Leonardo da Vinci National Science and Technology Museum Foundation.

The institutional structure chosen is that of a Participated Foundation, a nonprofit entity with a national mandate which in the eyes of the law is a private company. This new institutional model allows for private and public capital to work together and gives the museum greater operational flexibility: its structure was conceived with the intent of bringing together, as members, a variety of subjects (individuals, associations, foundations, institutions, public and private entities) that can contribute a varied capital to the entity (not only of money, goods and real-estate but also skills, services, specific know how or hours of work) giving the museum the structural and financial solidity of traditional foundations while guaranteeing cost-effective and efficient management.

The founding members of the renewed entity are:

The State

The Region of Lombardy

The Province of Milan

The City of Milan

The University of Milan

Lombardy's Industrial Association – Assolombarda

Milan's Chamber of Commerce.

The Museum's operating budget will be developed as though it were a private entity, adopting managerial practices that result in the greatest profitability; nevertheless the Museum must be able to make innovative and promotional choices which are not strictly determined by market forces in that its purpose is to act in the public interest, which is not immediately quantifiable. This is why the support of the community represented by the public entities at all levels (State, Region, Province and Municipal) is essential.

One third of the funding for the Museum's activities will come from the public sector, a third will come from the private sector and a third will be self generated (ticket sales, merchandising etc.).

### **The institutional structure of the foundation**

The new structure of the Museum includes the following components:

**Founders Assembly** – made up of the founding members, public and private entities that participate in the establishment of the endowment fund; the assembly has its own budget, elects the administrative councillors and supervises the Administrative Council;

**Administrative Council** – made up members, representatives of the different levels of Public Institutions, private patrons who make a significant contribution to the foundation, other users that belong to the industrial world. The Council establishes the general course of development for the foundation, prepares the projected and actual budgets, nominates the President, the Executive, the Director, the Supervisory Committee, the Cultural Committee, thematic committees;

**Executive** – made up of the President, the Director and two Vice Presidents. Its tasks are to outline spending policies, to propose initiatives and manage the Administrative Council's directives, and supervise contracts;

**Central Direction** – made up of the Director, a position with a four year term and managing director powers, the Department Directors and the Administrative Services Director, who are nominated by the Executive and have a four year term. The Direction determines the strategic course of action for the Museum within the general program determined by the Foundation's governing bodies;

**Department** – While the Department Committee gives council on the department's programs the Department has autonomy in terms of budget and personnel within general resources and directives. It also undertakes its own cultural and economic initiatives.

This institutional structure not only allows for the involvement of large companies, entities and universities, but also favours commitment to the project by individuals who, by making a modest contribution, can participate in an active and direct manner in the life of the institution and receive the relative benefits. These “science shareholders” will be able to express their commitment to the Museum and participate in the decision making process. Companies and organizations that, by financing specific activities, enrich the Museum’s divisions and departments will be part of this membership category. This aspect acts as a unifying agent between the organizational and thematic renewal of the institution.

The transformation of the Leonardo da Vinci National Science and Technology Museum into a Participated Foundation is part of a greater process which clarifies the role of the modern Italian State as one of policy making rather than direct administration. This institutional model underlines the will to directly involve individual citizens, entities and institutions in the cultural diffusion of the country. In particular, this transformation allows the industrial world, which is directly interested in the Museum’s success, to finance part of the institution’s needs and to participate, together with the public entities, in its management. Nevertheless, the State remains a participant in the “life” of the Foundation in terms of both financial support and management, as representatives from the Ministries of Education, Universities and Scientific Research and Heritage and Cultural Activities will be part of the Administrative Council.

The State also has the tasks of deliberating on modifications made to the institution’s statute and the dissolution of the Foundation, which, in all other aspects is a true private foundation to which apply, even in issues of management, the provisions of civil law.

#### The Dispersed Museum:

The Museum’s renewal is not only in terms of its institutional structure, it also concerns the organization of museum activities administered by the various departments.

The central aspect of the organizational renewal is the museum’s decision to go beyond its traditional centralized approach to the interpretation of scientific knowledge through an increase in small and large thematic museums, exhibits which are spread out over a geographical area, industrial archaeology and other non-centralized means of diffusion, which has led to the development of thematic **departments** organized by both scientific nature and historical-technological character. This organizational model allows the museum activities to be paired with specific thematic aspects of the industrial world.

The thematic departments are organized into the following divisions:

- Mathematics, physics and chemistry
- Industrial archaeology and technical and technological documentation
- New technologies and communication
- Ground transportation
- The sea
- Flight
- Agricultural sciences
- Library
- Education
- Etc.

The department, though under the control of the Foundation from which it receives most of its funding, will be a fairly autonomous structure. It will be able to have its own resources with self generated revenues gained from its interactions with the industrial world, and at the same time it

will be able to influence the development of the Museum's annual program. Each department has its own Scientific Committee which outlines its course of development, albeit remaining within the general directives articulated by the Museum as a whole.

Therefore, the departments are not necessarily tied to the existing Museum configuration: many will be completely new entities that develop as the Museum evolves.

Several factors are considered in developing the organizational structure of the departments.

A first reorganization is tied to the general network for the interpretation of scientific/technical knowledge. The Museum is creating a truly national network for the diffusion of scientific and technical knowledge, by developing contacts with other Italian entities: the goal is to establish an ongoing dialogue and ties with the History of Science Museum in Florence, the IDIS Foundation in Naples, Experimenta in Turin, the Cotton Warehouses Interpretation Centre in Genoa, the Immaginario Scientifico in Trieste, and also European entities such as the Deutsches Museum in Munich. The Museum has introduced a joint program with the museums in Florence and Naples which aims to catalogue the smaller entities throughout Italy and coordinate them by the type of information they present. The results of this program will be available on the internet.

The Museum is also presenting itself as the fulcrum for the coordination and ordering according to theme of existing science museums.

The dispersed museum is also achieved from the point of view of historic and technological departments. The involvement of companies which are particularly active in a specific sector of technology is fundamental to the renewal of exhibition spaces with a technological character. This requires both financial and expertise contributions and allows the company to become involved in a more in-depth manner.

Within the actual Museum building the relationships with the major companies will be "historicized": the IBM Room will be a museum of the history of the computer, with the creation of educational stations dedicated to the internet, multimedia, and virtual reality; IBM together with Telecom (an Italian telecommunications company) also participated in the development of the new exhibit for the electronic technologies department.

The new organization of the Museum includes a new way of interpreting science through dispersed departments spread throughout the city. Certain Museum departments will be developed outside of the Museum's walls: the restoration laboratories will be located in the new university campus at Bovisa, property of the Polytechnic of Milan; the airplane museum will be set up near the Malpensa airport in the former Caproni warehouses; the museum of agriculture will be moved to l'Azienda Agricola di Landriano; a train museum is planned in the out of service Porta Vittoria train station. Another possible tie with its territory and industry is Milan's role as the center of coordination and assembly for Northern Italy's textile industry.

Through the dispersed departments the Museum aims to create a true national network for the interpretation of science and technology in which will participate large entities, like AEM's energy museums (gas and electricity), as well as smaller entities such as thematic museums, that need to be revitalized through their insertion in cultural itineraries, exhibits and factories as places which can be visited to understand the production methods of our times.

Where there already exists established institutions dedicated to a theme (such as the Museum itself), there is no need to set up new locations therefore the department can function as a simple information center for the public, through coordination numerous existing museums that share a common scope.

# Museu d'Arqueologia de Catalunya. Empúries

Valeria Beolchini

## **Innovative Key-points**

The Monumental Zone of Empuries is one of the Iberian Peninsula's most popularly visited archaeological sites. Since its legal transformation into an autonomous body of the Deputation of Barcelona in 1993, great effort has been made to modernise and renovate its existing structures and to create a trained full-time technical staff for the development of visitor services. Empuries is outstanding in the nation for its educational programmes for schoolchildren, who account for more than one-fifth of the annual visitors to the site.

In 1994 and 1995, a two-year training course was organised at the site. The aim was to offer unemployed youth the opportunity to become specialists in fields related to the conservation and improvement of archaeological sites. Training was given in the restoration of ancient masonry structures, the planning and designing of gardens and in the cultivation of Mediterranean plants in nurseries.

While undoubtedly a highly innovative program at both the national and European levels, unfortunately it has not yet been adopted for use elsewhere. Nonetheless, the concept which was developed and refined at the "Emporiton" School-Workshop would be well suited to other archaeological zones, both nationally and abroad, where the following two conditions are met:

- they can rely on good centralised management and organisation;
- they have access to public funds allotted for professional training programs.

## **Short Description**

The ancient port of Empuries in Northeast Catalonia is located in one of the most beautiful areas of the Costa Brava, where tourists from all over the world gather during summer months. It is unique archaeologically in that it is the only site on the Iberian Peninsula where the ruins of a Greek city (*Emporian*) and a later Roman city (*Emporiae*) are preserved side by side, and in some places overlaid.

Founded by merchant traders in 600 BC, activity at the port of Empuries always remained strictly commercial in nature. From the outset it served as a point of exchange (*emporion*) between merchants and the local residents, owing to its strategic position along the shipping routes passing from the northern Mediterranean towards the rich regions of the southern Iberian Peninsula.

The original nucleus of the colony was located on a small island facing the coast (where the modern town of Sant Martí d'Empuries, referred to in ancient texts as "Palaia Polis" now stands). Later, the inhabitants moved onto the mainland, to an area which became known as "Neápolis". Towards the end of 300 BC, during the second Punic Wars, *Empuries* was conquered by the Romans and became a crucial centre for the spread of Roman influence on the peninsula.

The economic splendour of the area declined rapidly towards the end of 100 AD, however, as a result of changes in the Mediterranean trading routes. Empuries survived for two centuries more before being completely abandoned. The southern reaches of Neapolis later served as the site of early Christian burying grounds. By 300 AD the population centre had shifted once again towards the present-day city of Sant Martí d'Empuries, the ancient Palaia Polis, which was destined to become the capital first of Frankish territories and later of Catalan territories until the end of the 11th century.

Excavations at the site began in 1908, and research has continued uninterrupted ever since, except for the years of the Civil War (1936 - 1939). Today, only 25% of the entire remains and only 10% of the Roman city have been uncovered.



## **Policy towards the Staff**

During the two-year period from 1994-1995, a professional training course and placement program (EMPORITON) was organised at the site. Seventy young people ranging from 16 to 25 years of age participated in this highly innovative and pioneering project. The initiative was born out of the program “Escoles-Taller i Cases d’Oficis” which was developed in 1985 by the Spanish Ministry of Labour and Social Security in collaboration with several institutional partners, including the Local Tourist Board for the Monumental Zone of Empuries (OACME) under the direction of the Deputation of Barcelona, the Municipality of Escala, the National Institute for Employment Development (INEM) and the European Social Fund.

Earlier, in 1991, the European Centre for Cultural Heritage had recognised the need for promoting the potential and services of the Catalan archaeological site. The School-Workshop of Emporiton was born in 1993 with the precious assistance of OACME.

The principal aims of the project were to:

- promote training and qualification of the necessary human resources in order to meet employment demands generated by the development of the Monumental Zone of Empuries;
- create training programmes for professional qualification of the young participants of the school-workshop, to facilitate their entry into the workforce, either directly within the project, or indirectly, in collaboration with other service organisations and enterprises in the region;
- develop improvement programmes and the creation of new services within the Monumental Zone of Empuries;
- create new pathways and trails through Empuries and improve existing ones, in order to make visits to the site more enjoyable;
- plan a restoration and conservation programme for the monuments and provide aesthetic improvement of the garden areas;
- integrate the policies of a national employment project at the local level in the area of archaeological site management;
- participate in development plans promoted by the municipality of Escala.

“Emporiton” was thus developed in order to integrate unemployed youth into state-financed employment opportunities and to train specialists in fields safeguarding the cultural, historical and natural patrimony.

The students were assigned to one of the following courses:

- 1) restoration of archaeological structures;
- 2) Mediterranean garden planning and design
- 3) nursery cultivation techniques for local plant life.

Selection of the participants was made following a public announcement to all unemployed youth from 16 to 25 years of age who were resident in one of the towns of the municipality of Escala (Figueres, La Bisbal, l’Armentera, Sant Pere Pescador, Vilademat, Verges, Albons, Ullà, Bellcaire, Torroella de Montgrí, Vilamacolum, Ventallò). The INEM required only that applicants not have had previous employment. Out of 2,671 applicants, 45 young people were selected to participate in the programme on the basis of interviews and conversations oriented towards identifying suitable members of work groups which were heterogeneous in terms of education. Every attempt was also made to equally represent both males and females in each group

One interesting aspect of the project was that remedial courses were also given in regular school subjects and in the Catalan language. By the end of the course, in fact, many of the students had also completed their secondary school diplomas. The extremely straightforward organisational structure of “Emporiton” also guaranteed that the students participated fully in

every phase of development of the project. This included the initial setting up of work areas, including the construction of storage structures, nurseries and spaces for the traditional classroom lessons to take place.

The staff consisted of:

- a director and a co-ordinator responsible for the initial selection of students and for the planning and scheduling of the school-workshop courses;
- two administrative assistants;
- a co-ordinator for each of the following subject areas:
  - 1) an archaeologist for architectural restoration;
  - 2) an architect for garden design and planning;
  - 3) a forestry expert for nursery cultivation.

The flexibility offered by members of the team, who often shared a number of responsibilities, was made possible thanks to the overall co-ordination by the director.

“Emporiton” was offered over the course of four semesters consisting of an introductory unit, two training units, and a final semester dedicated to specialisation.

During the second semester, students began receiving offers of employment under regular training contracts. This is in itself noteworthy, since all of the participants were involved in their first professional experience. In addition to traditional classroom lessons and the specific techniques studied in each subject area, the program also included:

- 1) cultural visits, to familiarise the students with the myriad of conditions characterising the region today;
- 2) remedial courses in academic subjects and courses in Catalan;
- 3) professional and business training;
- 4) specific training for each of the subject areas;
- 5) specialised workshops.

The final semester was dedicated to specialisation, and included practice in resume writing and interview techniques, discussion of the employment selection process, and courses in marketing, business and management, contracts, and basic management of co-operatives (courses held by a professor of the Co-operative Training and Promotional Foundation of the Department of Employment of the Region of Catalonia.)

Results: At the end of the two-year course, the organisers contacted 283 companies, primarily Catalanian, which are active in the fields of construction and garden planning. As a result, many of the newly trained graduates of the program were hired.

A service co-operative was also formed (A.R.P.A. SCCL) by six students and two of the subject co-ordinators in restoration and gardening; unfortunately, this initiative was not successful. Finally, two of the students have been working steadily at the Monumental Zone since completing the “Emporiton” program.

### **Strategies towards the public**

More than 20% of Empuries’ 213,575 visitors in 1998 were students. For this reason, in 1993 the Catalan site organised an “Area de Difusión” managed by specialised technical personnel, for the planning of public services and educational programmes for its younger visitors.

The staff of Empuries have also created a special series of theme-based study visits for students (“Even the Stones Talk”, “Living in the Past”, “Empuries, the Greek Colony”, “Empuries, the Roman Colony”). The subject of each visit is determined on an individual basis with the teachers, according to each group’s particular needs. One of the programs, “The Roman

Visit”, has been particularly popular. It involves two ancient residents, *Caius Aemilius* and *Iulia Domitilla*, who guide the visitors on a pleasant walk through the ruins of the city of Empuries as they describe their lives during the first century BC.

Another program consists of a series of learning workshops in which the students get first-hand experience concerning archaeological finds from the site. For example, the workshop “The Mysteries of Empuries” allows students to play and discover the world of antiquity through examination of reproductions of the objects uncovered during excavations; the workshops “Ceramics in Ancient Times” and “Opus musivum” give students hands-on experience as they paint ceramic containers and create small mosaics. Each activity is supported by specially designed materials furnished to each class. The “Missions Empuries” briefcase, for example, contains objects recalling the everyday life of the inhabitants of ancient Empuries, as well as slides, plants, and texts which describe the archaeological area.

Services to the students have been supplied for many years by the service co-operative “Artemis SCCL”.

The Monumental Zone of Empuries has been conducting detailed annual studies of its visitors since 1993. Special attention is given to data concerning the nationality, age and level of educational achievement of visitors, as well as how much they spend at the site. As this data has never been published, unfortunately it cannot be included here.

Among other services offered to the public are self-guided audio tours, special-subject tours offered in the major European languages (English, French, German, Italian, Dutch and obviously Catalan and Castilian) and numerous complimentary brochures.

As of last year, “ancient Roman” guides give tours of Empuries at sunset (8:30 - 10:30 PM) each Friday and Sunday during the summer months. This is certainly one of the best times to walk through the ancient ruins, when the atmosphere of the ancient past can most easily be evoked. The evening visit concludes with a multivision film recalling the images and music of the history of the site, and then the visitors are invited to a reception in the nearby town of Sant Martí d’Empuries. All of these events are included in the price of the ticket.

The Emporiton programme continues a long tradition at the Catalan site of involvement in training and educational programs. The “Curs d’Arqueologia” scholarship, which was created in 1946, offers up to 30 young architects from all over Europe the unique opportunity of experiencing life for a month at the archaeological site. There they work on excavations in the morning, and in the afternoons they attend seminars held by scholars from all over the world on subjects which vary each year.

## MuSiS

Association for the support of the museums and collections in Styria

Monika Horny

### **Innovative key-points:**

MuSiS is a cooperation of local Styrian museums in the field of marketing, financing, networking and regional cultural work. It was the first association in Austria of this kind and it became a model for the other regions of Austria. MuSiS is creating an Austrian-wide museologic advanced training program for non-academic people who are already working or are interested in working for the regional and local museums. This project will create 13 new jobs.

### **Short description:**

In 1991 after several years of planning and structure work MuSiS was created as an umbrella organisation of the museums and collections of Styria

As a group of self-helps the association serves primarily as a platform for solving museum problems in general. MuSiS understands itself at the same time as mouthpiece for the "cultural upholder" museum in the public. With this union "at the base" MuSiS became a model for the other lands of Austria.

In 1995 MuSiS started a project together with the "ARGE – Regional Culture", which documents all the existing museums and collections in Styria. This project was supported by the cultural department of Styria and the Federal Ministry for education and cultural affairs.

In 1999 brought up to date the museums of Styria are now in the Internet callable. Today MuSiS was established as non-partisan and independent interest agency for the museums and collections of Styria. MuSiS cooperates with museum federations and professional associations on a national and international level.

At present there are about 220 museums and publicly accessible collections to most diverse adjustment in Styria. Homeland -, free light -, local and city museums, technical, commercial, art and art-commercial collections as well as museum memorial places are to be found.

According to the opinion of foreign experts some of the collections are to be classified even European-wide as "emphasize-worthy" and "singularly".

The museums of Styria retain cultural properties in the broad spectrum between everyday life and advanced culture and have thereby identity pin end effect. They carry for the history of the country and its population an inestimable, for so far often too little out considered contribution.

### **The Tasks of MuSiS**

- MuSiS informs: Central function of MuSiS is to serve as an information platform for the museums and collections of Styria concerning legal, technical and organizational interests. Outwardly MuSiS tries to achieve the best medium and public relations work, in order to make the meaning of the museum clear as culture carriers, as institutions for education and as identity-donating factors in regional-cultural development processes.
- MuSiS advises: For solving the problems and giving inquiries information and consultation MuSiS offers his member institutions speech and visiting days.
- MuSiS represents: In public MuSiS appears as a representative of the museums of Styria towards other culture carriers, networks and the public hand. Since 1997 MuSiS assumes the interest agency of the regional museums in the "culture discussion forum" of the national cultural department.
- MuSiS cooperates: MuSiS tries to get the contacts of the museums among themselves and outward to manufacture for example with external specialists or representatives of economics and politics. MuSiS maintains besides co-operation on national level in particular with

regional care mechanisms in Lower Austria and Salzburg and on international level with mechanisms like the "national place for non-governmental museums in Bavaria" (Munich) or the EMAC, the European museum Advisors Conference. MuSiS has contacts to ICOM.

- MuSiS communicates: MuSiS supports the emergence and guidance of regional discussion forums of museum representatives. These serve for in particular to the identification of regional museum examples and creation clear corporate identity. By means of this profile the establishment of contact of the museums is facilitated to tourism, economics and public hand.
- MuSiS publishes: MuSiS functions as a publisher of museum-referred writings. In 1998 the museum leader "museum country Styria" has been published. In addition the magazine "Stellwand" appears quarterly, which is representative body of the association of MuSiS, and addresses itself not only to a professional public, but also to interested museum lovers.
- MuSiS forms: MuSiS organizes annually under a special slogan the "Styrian museum day" as well as the "MuSiS-Studenttag". In addition MuSiS offers six advanced training modules "Professionalisation and networking in the Styrian museum landscape". These are six continuing education courses for a basic training for museum persons employed. The project team of MuSiS pursues the target to certify this Training courses.

#### Financial situation of MuSiS

The association is supported by public funds: AMS (labor market service), St:WUK (Steirische Trägergesellschaft für Wissenschafts-, Umwelt- und Kulturprojekte) and the Federal Ministry for education and cultural affairs. MuSiS has also a direct income out of member's fee, ATS 365 for every member. This means 1 Schilling for every day of the year.

#### Policies towards staff

Together with the AMS (Austrian labour market service and the St:WUK (Steirische Trägergesellschaft für Wissenschafts-, Umwelt und Kulturprojekte) it was possible to create new jobs within the association. Since last year there is a permanent working team in the main office:

- a historian/culture manager
- a folklorist/culture manager
- an art historian/marketing expert
- a secretary.

They meet weekly in order to discuss further steps.

#### Current Projects

MuSiS of projects target by MuSiS can be attained by projects different targets of the museum work. Here we present the current projects and intermediate results:

- "Museumsland Steiermark" - The book of the Styrian museums and collections serves as printed travel companions for the attendance of the museums of Styria.
- Creation of new jobs within the field of museums

MuSiS tries to help especially those museums' leader who don't have an academic training. Therefore we are offering special trainings.

Within the scope of the project „networking and professionalizing in the styrian museum's landscape“ - which was initiated by MuSiS in cooperation with 13 styrian museums in order to raise the quality and standards in styrian museums - MuSiS, offers 8 advanced training modules especially for those workers which are part of this one-year project.

The workers will be professionally trained in order to qualify them for the museum's area. For this the already existing offer from the side of MuSiS and Museumsform Steiermark will be used. The 8 modules will give the participants an understanding of all-day museums's problems and are as to the contents learnt upon the in planning being Austrian-wide museologic advanced

training programme for non-academic people. It will also be a model trial of the project's idea of a certificate that will parallel be developed. This modules are also open for other people who are interested in this theme but they have to pay a fee.

The modules are organised in cooperation with the two Austrian regions Salzburg and lower Austria, the federal office for adult-education and the museum's division in the federal „Denkmalamt“.

MuSiS project-team pursues the aim – as already mentioned - of concluding these modules with a certificate in order to verify the basic museologic education for non-academic people. This should be realized in cooperation with the „adult education“.

The following 8 modules will be offered:

- 1) Inventory-work
- 2) Working with the object, the thing and materials
- 3) Costumer care
- 4) Computer-aided working in museums
- 5) Financial strategies in museums
- 6) Corporate identity in museums
- 7) Marketing in museums

The lasting two modules are not planned yet as we will respond to the wishes of the project's participants.

To complete the special training program for museums-workers, two other events will be organized. Differently to the training modules they will be – as every year - open to all museum workers in Styria and the neighbour regions. In one year 18 new jobs could be created at 13 museums.

- small museum & contemporary art

MuseMuseum – a community project of MuSiS and IGS 2000.

For the most small and regional museums it is very difficult to present themselves to public. There for it is a task of MuSiS to force networking with the Styrian museum landscape. Target is to strengthen the image of the museums by common activities towards the public but nevertheless keep the individuality of each individual museum.

MuSiS tries to built a structure for common Corporate Identity. A platform for a common presentation will be the “IGS – Internationale Gartenschau 2000”. The aim of MuseMuseum on the IGS 2000 is to show the fact that despite often missing infrastructure (who from the small museums has already access to the network?) the common opinion of the " dusty " museum today is no longer current.

### MUSE museum - an interdisciplinary challenge

Young artists, who it is issued often similarly as the small museums, which have too little financial means, in order to realize their creativity, is the opportunity is ordered to try about MUSE museum an artistic cross-setting of the disciplines.

The opportunity can be ordered to the artists to visit a museum and to process their impressions in artistic work (installations, hear feature/via headphone, video...). Thematically is meant of the processing of the klassischen museum functions - collecting, retaining, issuing and mediating and researching -. As important topic networking is added.

In the center to temporally an object of the daily will be located limited MUSE museum. As result of the argument an exciting develops from young and alto parallel to it in the appropriate museums artistic intervention a fitting the topic is next to each other presented on the IGS area (150m2 exhibition surface) for five weeks.

At the same time there is the possibility for all member museums of MuSiS of presenting itself day long. Museums have to present the possibility one day long an article from their museum as object of the daily. At the same time a coworker of the museum is to be for information and inquiries to its museum for order. Possible procedure: in the tages-Wechsel museums imagine, so that a large advertising effect does not only develop, but also communication between the museum coworkers are forced.

- “Kulturlandschaft Ennstal” as a model for regional networks in Styria

MuSiS tries to realize the idea of the museums network in the region Ennstal on the basis of "Kulturlandschaft Ennstal ".The network, which is to develop here, goes thereby particularly into four different directions:

Networking of marketing and public relations

networking in organizational interests

networking by exchange of experience and knowledge

networking within the area stock switching.

- “Kulturlandschaft Ennstal”

The idea to interlace cultural initiatives and museums of the region Ennstal together was born 20 years. When in May 1999 the association MuSiS together with AMS and ST:WUK as financial supporter gave the starting signal for project “networking and professionalisation” within the Styrian museum landscape " the idea moved again into seizable proximity.

The model " CULTURE LANDSCAPE ENNSTAL " to the twenty museums of completely different size, personnel structure and with different collection emphasis are loaded to participate in an interlaced "culture landscape Ennstal". From the highest situated museum of Styria in Ramsau, from the nature park house Großsölk in Stein at the Enns over the landscape museum Schloß Trautenfels, up to the monestary museums in Admont, of the museums of the Salzkammergut, up to the Silvanum in Grossreifling, there are a lot of various and interesting museums, which could be part of the network of the musealen landscape in this region.

The terms nature and culture and between them the various life designs and work worlds of human beings in this region can be the mirror of a regional identity and form a bracket for the documentation of past and present.

### Concrete Steps

First concrete steps for the networking of the museums in the region Ennstal were already made. This year in May MuSiS organized a first meeting of the museum conductors and chiefs. Ideas and experiences were exchanged. MuSiS has begun to raise existing co-operation and networks in the district. The communication between the museums and cultural initiatives is to be up and developed. Now open working groups are created for example about marketing and public relations and mediation.

The association “ARGE BetreuerInnen von Regionalmuseen in Austria” has been founded under the under the leader ship of MuSiS for a national wide exchange of information and experience.

## **International Cooperations**

- **Cooperation of Styrian an Slovenian Museums**

MuSiS tries to support the Styrian museums in their activities with practical tips and scientific know how for more than 10 years. Now MuSiS tries to merge also Slovenian museums into its marketing activities, in order to force the culture tourism in this Syrian – Slovenian region.

To keep produced beside an image folder, which lists all museums and hotels involved, a bonus booklet, which enables it to the guest, in the participating museums and hotel a price reduction.

Condition for the participation of the museums and hotels is the grant of a price reduction from 10 to 20 %. This activity will be supported by the Graz tourism and tourism Styria.

Image folders and bonus booklet can be received all over Styria for interested customers, so that an public-effective marketing is surely placed. Additionally the Steiermark tourism advertises the action in its brochure.

### Styrian and Slovenian museums

The possibility to visit museums, is more than only given in the Steiermark and its southern neighboring country, only few know from the existence of these museums. By direct marketing internal messages - as it evenly the wine country Steiermark presented us - the image of the museum can be revalued and be brought the museum customer more near that museums are services enterprises and anxious show up to offer excellent quality and service.

MuSiS already took up contact with some Slovenian museums, which are gladly ready to take part in the project “Styrian museum bonus booklet” so that a transnational co-operation could develop. Planned is likewise a co-operation with Styrian and Slovenian hotels and restaurants, so that a “culinary-cultural bon-bon” can be offered to the museum customer.

### Process way

MuSiS will take over the production of the image folder, in which all museums, hotel, restaurants, which want to take part in the project beside the production of the bonus booklet, are listed and described. Condition for the participation is the grant of a price reduction of 10 or 20 %.

The bonus booklet, which will be produced in very a handy size, will be driven out by the Styrian Tourism and Graz Tourism, which means the fact that this booklets can be received all over the land free of charge to the interested customers is, so that an public-effective marketing is surely placed.

Thus that the bonus booklet is equipped with a stamp field, can be granted to each customer the price reduction only one time. If this idea finds an echo, the preparations can start immediately and the spring/summers card can be produced.

### **Targets**

Target of this marketing activity is the promotion of the regional economic development in the Slovenian - Styrian region. It is to come to direct income effects, which are to protect and improve their future chances to the population in the region.

Priority axle 2: Economic development and co-operation

- Possible agencies responsible for the project: Steiri and Slovenian museums as well as Styrian and Slovenian hotels and guest operations
- Targets and measures: Contentwise and organizational networking of cultural activities and projects and a mutual linkage with the Slovenian neighbours.
- Expected effect: Attractivity and diversification of the troutistic and cultural supply; improves extent of utilization of the operations and mechanisms; Forcing the residence tourism; Image formation for the culture region Styria/Slowenien; cultural exchange and co-operation for the intensification of mutual relations
- A transnational character: Shaping and improvement of the routistic supply; Networking of the structures (information, marketing); mutual coordination and supplement with supplies; Revaluation of the region; common advertising strategies; common target groups
- Duration of the measure: Spring/summer 2000 (with success extension).



# **The Ragged School Museum**

## **A Community Museum in London's East End**

Judi Caton

### **Innovative key-points:**

The Ragged School Museum is a small independent neighbourhood museum in a deprived inner city area which has community service, combating social exclusion, as a core aim. It is an admired and leading exponent of a museum embedded in its community, bringing opportunities for active learning and leisure involvement where people have few options.

The Ragged School Museum is a leading example of small museum enterprise in the UK. It has clearly identified its mission and market niche and attracts funds to meet its goals to raise the expectations of local people and to increase the opportunities open to them. The museum has no core local authority funding and raises all its funds itself, on a project by project basis. It seeks partners in funding projects and is increasingly sought out by partners keen to work with it.

The museum regards success as becoming a valued part of the community, and looks outside arts organisations to the way other local institutions (e.g. health centres) operate in the community for inspiration and models.

The model is particularly relevant to inner-city areas across Europe (often poor areas with large immigrant populations) where arts and cultural bodies have an important role to play in social exclusion.

### **Short description:**

The Ragged School Museum, located in one of the poorest boroughs of London, Tower Hamlets, directs its museum programmes towards the continuously changing needs of the socially excluded local population. In an area where unemployment is twice the London average, one in 4 of the population is Bangladeshi, and 24% of adults have low levels of literacy, the museum continuously responds with services to meet evolving community needs.

It raises all its own funds on a project by project basis and has placed an emphasis on giving young people, many of whom have long periods of unemployment, more choices for managing their leisure time.

The museum, governed by an independent charitable trust, occupies late Victorian canal-side warehouses converted for use as a free school for poor children by Dr Barnardo who later founded the famous homes for orphan children. Visitors can experience how Victorian children were taught in a reconstructed classroom of the period, and can see displays on East End life in the 1890's.

The case of the Ragged School is interesting because:

It has a very well defined mission and a dynamically entrepreneurial approach for a small institution

It combines this businesslike manner with a strong educational function – that of working with a socially excluded local community

The museum is essentially about celebrating people and their lives, not about accumulating and interpreting artefacts from the East End of London.

The museum relies on developing partnerships both within and without its community

For many inner city arts and cultural institutions the way of working demonstrated by the Ragged School is not just a policy but a way of life.

## Funding

The Ragged School's funding is both dynamic and precarious. It operated in 1998 with a budget of just £93,710. Of this £81,210 took the form of income generated by the museum and restricted grants, that is grants given for particular activities/projects by trusts, arts bodies and businesses. The remaining £12,500 is unrestricted funding.

Some £30,000 comes from the same 2 sources each year, the London Boroughs Grants Scheme, (a grant giving organisation fed and controlled by all the 33 London Boroughs) and a service level agreement with the local education authority to provide an education service to Tower Hamlets. Both of these sources of funding are due to end in April and December 2001.

This means that the museum, already raising more than £50,000 a year, now has to secure new sources of funding in the near future.

## Staffing

The museum relies on a few staff with high quality expertise, volunteers, and imported skills as and when it requires.

**Internal** The Museum Manager is responsible for the community education programme, and the museum has recently taken on a part-time Community/Special Needs Worker. The marketing function is covered in different ways by different people on a project basis, while a volunteer one day a week provides a Press service.

**External** At the same time the museum recognises that its success depends not just on its staff, but on the quality of its advisers and partners in the community and its dialogue with them. Community partnerships are therefore as ongoing and continuous as internal staff relations.

Occasional professional advisers are contracted in, and at present the museum is benefiting from development advice.

**Skills** The museum identifies the main skills it uses to develop as;

clarity of vision and leadership.

listening to its community and adapt its programmes to meet their changing needs. This requires empathy, real dialogue, and reaching understanding. It also requires flexibility, as the community moves on and the museum must be able to constantly change its programmes and its approach.

planning effectively, and the museum admits it needs to tighten up its procedures and complete some policy work.

monitoring and evaluating its projects effectively

In addition the Ragged School knows that for success staff should be representative of the community they are working in.

## Strategies towards the Public

### Main Aims

The Ragged School Museum Trust aims to:-

Be the museum about East End Life

Be a place to which people return

Preserve the buildings and their history.

In June 1999 the museum issued a revised Quality Assurance Statement that includes the values that underlie the provision of services, highlighting the following;

combating social exclusion

encouraging a sense of community while celebrating diversity

providing a London-wide service, with a special focus on Tower Hamlets  
providing accessibility for arts and cultural activities  
empowering individual development in self-esteem, skills and knowledge  
promoting education as a life-long leisure experience  
promoting active participation  
raising the profile of Tower Hamlets to a London-wide audience.

The statement also presents the Ragged School Museum Trust's main commitments over the coming years:

Commitment to increasing the number of users  
Commitment to value for money  
Regular dialogue with users  
Monitoring and evaluation of services  
Effective management procedures for staff and volunteers  
Partnerships with outside bodies  
Phased improvements in accessibility  
Effective use of the building space

#### Target audiences

The Ragged School Museum prepares and provides a range of activities designed to attract different market segments. Each activity is separately packaged, in terms of funding and marketing, and each is evaluated to enable the museum to continue to upgrade its programme.

The main target groups are local, that is children and young people, adults and family groups, and people with special needs all from low income segments. Some activities target groups from the wider East End, and some schools activities work London-wide.

#### Activities targeted to different audiences

Here is a breakdown of the Ragged School Museum's activities from April 1998 - March 1999 To give an idea of the main users and the programme planned for them. A total of 18,198 people participated.

*Schools programme* Number of users 9,284, paying £2 a head, £1 for Tower Hamlets schools  
Teaching delivered 3.5 days a week, 11 sessions a week. Schools from 29 out of the 32 London-wide boroughs take part in this programme. 97% of the returned schools surveys considered the quality to be good or excellent.

*Special needs schools programme* Number of users 281, by donation only. 2 sessions a week, with possibility of additional outreach. Newly funded service. Piloted during this year, after lengthy consultation. Recent direct mailing to every special needs school London-wide.

*Holiday activities* Number of users 4,885. Free service. 4 sessions a day, every Wed & Thur Easter/Summer/Christmas. Tues/Wed/Thur during Oct/Feb/May half term holiday  
Multiple funders. This service is intensely targeted to children from schools within walking distance, and then to Tower Hamlets. Success with children is due to partnership/support of local schools. Holiday activities are also marketed through London-wide listings and networks created by school visits.

*First Sunday of the month opening.* Numbers attending 1,704. Free service. funded. Family art workshops are organised to coincide with these openings. This enables the museum to be

featured in free listings. Targeting more London-wide and to those who work on low income. Many come from the Essex area.

*History club talk* Numbers 347. £1 waged, 50p unwaged, and free for members. Series of 10 lectures, held monthly. Targeting low income adults, with non-academic backgrounds. Predominately a white older audience, trying to vary programming to encourage new users, without discouraging regulars.

*Adult groups* Numbers 978. £2 a head. Talk delivered by curator. Due to time limitations this service is not pro-actively marketed. With new gallery we hope to train guides to deliver an increased service.

### Project development and marketing

The Ragged School works project by project, each being targeted at different groups and marketed accordingly. The project records for the Summer Holiday Activities in 1999 given below illustrate this working method.

*Project concept* Summer time in the inner-city borough of Tower Hamlets is hard for those who can only wish to be at the seaside. During summer 1999 holiday period the Ragged School Museum aimed to bring the seaside to Tower Hamlets, providing recreation for all ages and encouraging local residents to see informal education as part of their leisure activities. The concept for the project evolved out of watching a local playscheme ( for under school-aged children) and was first run in the summer of 1998. The programme of activities ran for the whole six weeks of the holidays, every Wednesday and Thursday. Monday was set aside for playschemes only.

*Exhibition* Whatever your age, culture or social background everyone has fond memories of trips to the seaside, whether it be Goa or Clapton. The exhibition entitled, 'Bringing the Seaside to Tower Hamlets'; included local residents memories of seaside trips. Displayed in the under 7s seaside play area, the exhibition generated a great deal of interest and provided carers with enjoyment while their children had the opportunity to play.

### *Seaside play area for Under 7s*

The seaside play area attracted many first time visitors to the museum. It was very popular with parents with children under 5 years who felt it was a unique facility as museums do not tend to cater for this age range. Some returned many times over during the summer at the request of their children. They stated this was ideal for them as it was local, did not involve vast expense to visit and was accessible to those on a low income. The younger children were very pleased there was an area especially dedicated to them.

One family came well prepared, bringing their swimming costumes along. Another commented on the unique atmosphere, saying it was the only museum where parents and people from different ethnic backgrounds mix and chat freely.

### Seaside art activities for Under 7s

Drop in art activities were available in the seaside play area, This is a development we introduced in response to the disappointment felt by many children in being unable to participate in workshops alongside their older brothers and sisters. Activities included making your own seagull, making your own flag, seaside postcards and many more. Between thirty to forty children a day participated. Children of all ages could make a finished product, and they really enjoyed using their creativity as well as playing.

### Seaside art activities for Over 7s

In response to large numbers and children being turned away last year due to lack of space, double the number of workshops were provided this year. This meant access was much more widely available. Nearly all workshops were full to capacity.

Tickets to the workshops were handed out on a first come first served basis one hour before each workshop. This method enabled children whose carers may not have been actively involved in their holiday time to have an equal opportunity to take part in the activities. For popular workshops children queued up to one hour before tickets were handed out.

The activities were based on the seaside theme and ranged from making lifebuoy shaped clocks to making shell picture frames and Punch and Judy shows. All children completed high quality finished products to take home.

### Activities for playschemes

All the playschemes within Tower Hamlets were sent information. Some follow-up phone calls were also made to encourage them to use our services. Though not targeted, playschemes from out of the borough also visited.

For the first time art workshops were offered on a Monday, treasure hunts on Wednesdays or Thursdays, and beach play if children were aged under 7. There was a good take up with all Monday art workshops booked out.

### Marketing to target audiences

Many different types of publicity were used but one of the critical success factors for attracting local children was direct targeting. A mail out of programmes and posters was sent to all schools in Tower Hamlets. Staff from the museum also went and spoke in five local school assemblies, showing examples of what could be made in the art workshops. and distributing leaflets to top classes. All libraries in Tower Hamlets were sent posters and leaflets to display, as were some community centres.

Partnership with the local housing association meant they included a one page spread in their residents newsletter.

The summer activities pull-out section of the local free newspaper 'East End Life' provided a successful source of advertising for those in Tower Hamlets and the East End. London-wide publicity was managed by the volunteer press-officer. The London Underground 'Family Travelcard' leaflet was very successful, and a mention in the Daily Mail (national newspaper) pull-out guide drew in many visitors at the end of the programme.

### Visitor figures

Attendances showed an increase of 57% from summer holidays 1998.

### Visitor Survey

- A survey was conducted of individuals and family groups visiting the museum, specifically those attending the Over 7s art activities as it was possible to establish details while handing out stickers for workshops. 11.7% of total visitors were surveyed (322 participants) 52.8% of visitors surveyed were from Tower Hamlets, many from the Stepney area local to the museum. A significant number of others were from other East End London boroughs. Participants were asked where they had heard about the summer programme. Those from Tower Hamlets cited the following sources: Library 8.2%, School 56%, Previous visit 17.7%, Other i.e. friend/paper 17.7%.
- A qualitative survey of 30 local children, mainly from Stepney (within walking distance of the museum ) was also conducted to establish what they enjoy and what activities they would

like to see in the future. These interviews were done by the Community worker, and the findings will be used to help plan the future holiday programmes.

- Records were kept of individual Playschemes attending Monday art workshops. A total of 19 groups bringing 263 children took part, and 63.2% of Playschemes visiting were from Tower Hamlets.
- An adult visitor book was kept throughout the activities.

#### Funders

Funders for summer holiday activities 1999 were as follows;

£1,000 Tower Hamlets Youth and Community

£500 Stepney Housing Development Association (SHADA)

£500 John Lewis Partnership (retailing company)

£300 Hilden Charitable Trust

£500 Tower Hill Improvement Fund

£xx Emée Fairbairn Charitable Trust

#### Written policies

The Ragged School has written policies agreed by the trustees for;

Quality Assurance

Equal Opportunities

*Education (in draft)*

#### Successes and plans for the Future

The Ragged School Museum regards its successes as follows;

- the museum is slowly becoming a valued part of the community
- it has continued to slowly increase its visitor figures year on year
- it is defining its role in the community, and working to its strength, that of engaging with local people and organisations
- it is making new partnerships in the community
- it is raising its profile in the museum sector

In 1995 the Ragged School won the Museum of the year award for Education work

In 1998 the museum won a commendation from the Gulbenkian Awards for its community work

In 1999 the museum is once again on the short list for the Gulbenkian award

The Ragged School Museum has secured the funding to renew its main local exhibition in 2000. Over the next few years the museum is concerned to learn and employ new techniques of working in the community from other arts and non-arts organisations. Though in terms of museums it appears firmly enmeshed in its community, the Ragged School regards other organisations as doing better, and knows community links and partnerships, in common with all relationships, are fragile and need continuous input. Each partnership is a building block in the museum's future.

# Sheffield Galleries & Museums Trust

## Pioneering 'trustification'

Judi Caton

### **Innovative key points:**

The Sheffield Galleries and Museums Trust is the first to be established by a local authority in the UK with a contract to manage its galleries and museums. The charitable trust model is tried and tested in the independent sector, but has not been applied to the public sector before.

The new trust effectively merged galleries and museums in the City which had previously been maintained under separate management.

The Sheffield Trust has signed a funding contract with Sheffield City Council (that retains ownership of the collections) for the period to 31st March 2004, and one with the Arts Council of England to guarantee a realistic minimum grant until the 31st March 2008.

Although parts of museum services are contracted out to the private sector in the UK this is the first contracting out of a major local authority service.

The Trust has restructured its staffing complement, bringing in new skills and establishing a training plan for all staff to enable it to meet its aims.

Potentially the exportability of the Sheffield model is high to other regions where inflexible local authority structures are impeding the development of public services and stronger financial performance. But the transferability of the Sheffield model depends on two key factors;

- the ability of the trust to deliver its services over the next 6 years, initially, and especially to demonstrate that it can attract new funding streams to meet its financial targets.
- the availability of stabilisation funds elsewhere in Europe, similar to those offered to Sheffield by the Arts Council of England

### **Short description:**

Sheffield is a large metropolitan city in Yorkshire in England recently made known to audiences throughout the world from the film, the Full Monty. Anyone who saw the opening sequence of the film will be aware that Sheffield is a city that is reviving in a spirited way after the loss of much of its industrial base.

Sheffield City Council set up an independent charitable trust in 1997 and contracted to it the management of its 5 non-industrial museums and galleries. The collections remain the property of the Council, and the Trust is guaranteed 1997 levels of funding to run the service for a minimum 6 years, when the deal will be reviewed.

To meet its targets the new trust has reorganised its staffing, increasing the number of jobs, creating new posts and making redundancies, contracting out a number of services, such as the conservation of objects. Teamworking across the 5 sites will be essential for success and has begun. Staff training much neglected in the past is another essential element. These staffing changes are not new in the British context, but their wholesale application across a 5 site service is a good model.

The Sheffield Galleries and Museums Trust manages the following:

- Bishops' House Museum
- Graves Art Gallery
- City Museum / Mappin Art Gallery
- Ruskin Gallery and Craft Gallery

The Trust does not manage the industrial museums of Sheffield which are now managed by a separate Trust created around the same time, Sheffield Industrial Museums Trust. This Trust

does not benefit from the Stabilisation Fund and is thus not guaranteed the same level of funding by the council.

The Trust's Business Plan sets out its longer term aspirations in a simple and straightforward way- *To be one of the leading gallery and museum organisations in the United Kingdom*

The Trust intends to become a national centre of excellence which has exhibition programming of international quality.

This experience is particularly interesting because:

- it is a response to the typical context, throughout Europe, of rigid local authority structures
- it is presented as a way of liberating a local authority service, of freeing it from internal bureaucracy to restructure, attract new private funding streams, and direct that funding to develop audiences and provide public services, and to be able to do this quickly
- the trust is pioneering the monitoring and measurement of several management contracts
- the trust has recognised the need to establish a staff structure for its long term aspirations bringing in new skills and providing for the enskilling of current staff
- the Sheffield Trust has the certainty of core funding for at least 6 years.

### **The definition and description of the governing body:**

Sheffield Galleries & Museums Trust is a company limited by guarantee and not having a share capital. It is a registered company, No. 3527746, and also a registered charity, No. 1068850. It is governed by its' Memorandum and Articles of Association.

#### Role and responsibility of trustees

The Company is managed by a Board of Trustees who also act as Directors under English Company Law. The Board consists of up to ten elected Trustees and four nominated Trustees. The elected Trustees are appointed by the members (members being existing Trustees) and retire by rotation after three years whereupon they may be re-elected for a further period of three years. Four nominated trustees are appointed as follows:

- There shall be no more than three Sheffield City Council nominated Trustees who shall be appointed to serve a period of not less than two or more than four years in the first instance. Thereafter the term of appointment shall be three years.
- The Victoria & Albert Museum Trustee shall be appointed by that Museum and shall serve for a period of not less than two nor more than four years in the first instance. Thereafter the term of appointment shall be three years.

The role of the Trustees is, inter alia, to ensure the fulfilment of the objects of the Memorandum and Articles of Association which are:

- (i) The advancement of education of the public through the provision, maintenance and support of museums, art and craft galleries within Sheffield and its environs;
- (ii) To promote, maintain, improve and advance public education through the acquisition (on a loan basis), care, management and display for the public benefit of:
  - (a) the non-industrial galleries and museums collections of the Sheffield City Council;
  - (b) the arts collection of the Mappin Trust;
  - (c) the collection of the Guild of St George;
  - (d) the collection of the Hawley Trust; and
  - (e) any other collections, groupings, displays or individual items from any other body which will promote the objects of the Company.



- (iii) The advancement of the education of the public by the aid, establishment, funding, or sponsorship of bursaries, scholarships or grants to any person or persons, institution, association or corporate body for the purpose of furthering the objects of the Company.
- (iv) Such other charitable objects as the Company shall from time to time determine.

### The Contracts

The formation of the Trust is governed by three main agreements reached with Sheffield City Council.

**The Transfer Agreement** sets out the transfer of the management of the galleries and museums from the Council to the Trust. It sets out the assets and liabilities transferred, the staff covered by the transfer and obligations of both the Council and the Trust following the transfer, including warranties and processes for covering litigation and disputes.

**The Funding Agreement** covers both the funding that the Council will provide plus the monitoring of the Trust. It also sets out how the Council will monitor the Trust's performance.

**The Collections Agreement** details how the Trust should manage the Sheffield Collections on behalf of the Council.

The agreements are such that all sites have to be kept open and any significant changes have to be agreed by the Leisure Services Committee of Sheffield City Council. The Trust is not currently contracted to open any other sites. Collections can be displayed at any of the sites and can be loaned to other organisations. There is nothing to stop the Trust opening another site in the agreements although the financial implications of such a move would preclude this in the near future unless further suitable external funding was found.

There were no specific precedents used by the lawyers as far as the Museum and Galleries world was concerned for the agreements. Sheffield City Council had already moved several of its Sporting facilities into Trust in the past and these were used as the basis of the Transfer and Funding Agreements. The Arts Council, the Museums & Galleries Commission and other interested parties were invited to comment on the agreements.

## **Funding Arrangements:**

### The Funding Agreement

The Funding Agreement reached with Sheffield City Council guarantees a level of core income support from local authority funds for the period to 31<sup>st</sup> March 2004. This is based on the budget set for the museums and galleries service by the Council for the year ended 31<sup>st</sup> March 1998 with certain adjustments to recognise the other services that the new Trust took over. The funding agreement allows for a 10% increase to the core grant after three years of the agreement. In the year ending 31<sup>st</sup> March 2000, the level of grant is budgeted at £1,396,676 or 57% of total income.

### Stabilisation Grant

In addition the Trust benefits from the receipt of a Stabilisation Grant from the Arts Council of England National Lottery department. This is intended to allow the Trust to increase staffing in managerial, marketing, operations and education in order for the Trust to establish alternative income sources. This Grant will also be used to refurbish the sites managed by the Trust, in particular to improve the shops, gallery spaces, cafes and other public facilities. It is hoped this will increase visitor numbers and average visitor spend. The Stabilisation Grant totals £1.13 million in total. It is planned to spend this over the first three years of the Trust's life. Thereafter extra income will need to be generated from the Stabilisation funded projects to support the new infrastructure of the Trust. In the year ending 31<sup>st</sup> March 2000, the budgeted draw down on the Stabilisation Grant is £620,743, or 25.6% of total income.

### Millennium Gallery

A further source of local authority income is money provided to the Trust for the new Millennium Gallery project. The role of the Millennium Gallery is to provide the following:

- The largest and most modern purpose built temporary exhibition space in the UK. It will primarily be used for bought in "Blockbuster" exhibitions which are currently seen as being paying exhibitions.
- A new home for the Guild of St George Collection that is currently housed in the Ruskin Gallery. On the completion of the new Gallery the old Ruskin Gallery will be closed and disposed of by Sheffield City Council.
- An enhanced Contemporary Craft Gallery, again to replace the current Craft Gallery at the Ruskin. Again this is expected to be the largest purpose built contemporary craft gallery in the UK.
- A new Sheffield Metalware Gallery. For the first time this gallery will ensure that a permanent home for as many of the finest pieces of metalware produced in Sheffield as possible will be created.
- Enhanced education spaces.
- A large shop, a café/bar/restaurant, Corporate Hospitality suites will be incorporated to provide facilities for new streams of income to be generated.

The new Gallery is being built by Sheffield City Council, and will be owned by the Council but managed by the Trust. Trust staff are also involved in the design in the exhibition spaces and the Trust is being paid a grant for this involvement as well as other costs it incurs on the project. In the year ending 31<sup>st</sup> March 2000 it is budgeted this will total £188,898 or 7.8% of total income. Once the Gallery is completed and opens (projected for March 2001) the Council will pay the Trust for the management of its operations. This is effectively the grant from the Millennium Commission paid to the Council to cover the revenue costs of the Gallery as a Millennium Commission funded project.

#### Income generation

The remainder of the Trust's income will be generated mainly from the Trust's own trading, private sources or grants offered by other public bodies. However it is not easy to predict these sources. The total income budgeted from this area in the year ending 31<sup>st</sup> March 2000 is £221,570 or 9.1%.

- Admissions Currently the Trust manages only one site that charges admission, although the Trustees have recently made a decision to end charging at this site as well.
- Sponsorship There has been little attempt to attract sponsorship since the creation of the Trust. A new post of Development Manager is to be advertised shortly. One aspect of their work will be to attract sponsors for specific exhibitions and / or other projects within the organisation. The precise details of sponsorship packages have not been finalised but will certainly include large-scale publicity, own private views, etc.

#### **Monitoring of the Trust:**

Monitoring of the progress of the Trust will be performed by the Trust in a number of ways. These include:

- As detailed above the right to have three nominated Trustees who sit on the Trust's Board;
- The right of attendance at full Board meetings, plus any sub-committee meetings of the Board, of the Head of Leisure Services, Sheffield City Council. This person used to be responsible for the previous management of the galleries and museums within the Council;
- The provision of monthly management accounts;
- The provision of full statutory accounts;

- The provision of certain information from the Trust's bankers;
- Provide an Annual Business Plan including three year financial forecasts, discussion of exhibition and educational programmes, marketing plans and capital expenditure;
- The provision of an Annual Report;
- The Chief Executive and a Trustee shall appear before the Leisure Service Development Committee twice a year to report on Trust activities and to answer questions from the committee
- Provide details on a quarterly basis of admissions to the galleries and museums.

No formal document has yet set out how the evaluation of the Trust's performance over the period of the Funding Agreement will be performed, or who it will be evaluated by.

### **Policies towards staff:**

Under the Council historically the galleries and museums had been two separate organisations with their own internal management structures. This meant effectively two curatorial teams, two front of house teams, two education teams etc. In addition there was no dedicated central support. These structures had been severely weakened through budget cutbacks primarily because as staff left they had not been replaced.

#### Aims and values

The Trust's stated aim towards its staff is;

- Creating and sustaining a committed staff team through good communication, effective training and career development.

The Trust's stated values with regard to staff are;

- We will take pride in everything we do.
- We will ensure fair, equal and respectful treatment for all staff and customers.
- We are committed to fostering honest and open communication and actions within our organisation.
- We are committed to realising the full potential of our people and will invest in their development

#### The new structure

Under the Chief Executive there are five main departments:

- Exhibitions and collections (responsible for curatorial matters);
- Education and public programmes;
- Marketing;
- Operations (visitor services and technical support)
- Finance & administration

The Trust took on 49 full-time equivalent staff when it started. The Trust is projected to employ 62 full-time equivalent staff by the end of the current year. The head-count equivalent is 52 to 71.

#### Teamworking

The departments still have staff based on different sites but they meet monthly as teams to ensure that regular communication is maintained. In addition staff from each department sit in on other departments' team meetings to ensure that all activities are co-ordinated across the Trust. Further, project teams are created (for example for each new exhibition) where members of

different departments work together on the projects to ensure again a co-ordinated approach is followed and to ensure all departments are kept informed of what is happening.

### Training

A Training Needs Analysis was undertaken by Price Waterhouse Consultants, and a further diagnostic report on training needs was carried out as part of the Trust's application to achieve accreditation as Investors in People (a national accreditation scheme which focuses on staff). Both of these studies were used to develop the Training Policy and Plan –see attachment – which has been formally adopted by the Board. It aims to ensure that the lack of training to staff in the past is addressed by ensuring basic training is provided to all staff.

Immediate priorities are customer service, health & safety, basic conservation and environmental monitoring skills, IT skills, management of staff, delegation of work, appraisal training, train the trainer. This is provided to staff using a number of avenues:

- Attendance at Area Museums Council training courses as well as hosting such courses
- Sheffield Training & Enterprise Council
- Sheffield Chamber of Commerce
- Links with Victoria & Albert Museum and Tate Gallery on their training courses;
- Shadowing similar grades of staff within the Victoria & Albert Museum and Tate Gallery
- Local European IT initiatives
- Cascading internally knowledge gained by staff on external courses
- Sheffield City Council courses
- Sheffield College
- Use of other organisations who provide training in more specialist areas (marketing, finance etc.)

A £20,000 budget for staff training has been allocated this year, plus a budget of £7,500 for attendance at seminars and conferences.

Once staff are considered to have received the basic training and skills for the roles they perform within the Trust, the Training policy states that consideration of more advanced training and other development training will be considered including Associateship of the Museums Association and other professional qualifications.

### **Critical success factors:**

Critical success factors particular to the Sheffield model are;

- the Stabilisation Fund
- the quality of the agreements
- the ability of the trust to demonstrate that it is able to attract private funding streams/meet its financial targets

Other factors recognised as critical here are probably critical to all museum developments. These are;

- reorientation must be accompanied by development, restructuring to stand still is unlikely to achieve success
- adequate time frame
- the quality of direction and leadership
- the ability to attract high quality new skills and to reskill present staff sufficiently to meet new goals
- high quality audience and visitor research to target funds to meet needs and to demonstrate improved quality in service
- adequate core funding
- investment/fundraising ability

# **Sistema Museale Umbro**

## Giovanni Festa Bianchet

### **Innovative key-points:**

The Umbrian Regional Museum Network (hereafter also referred to as the Network), established with Regional Law 35/1990 which decrees norms for museums belonging or of interest to local authorities (the first of its kind in Italy) is an articulate and complex case of Regional legislative provisions aimed at coordinating the availability and development of a network of services on a territorial scale. The innovation of the Network is that it brings together and integrates on a managerial/administrative level a group of small museums with different institutional forms while respecting the autonomy of each institution.

More specifically the following services are coordinated as a network:

a five-year regional plan for the Museum Network with the option of annual revisions, that establishes a means of communication between the individual museums and their integration as a regional network. Regional and local administrations develop and approve the plan together with public, private or clerical owners of museums or collections;

the Network's programming is established by a process of negotiation, i.e. consensus. The Region acts as the fulcrum of a network of autonomous entities which has the participation of the Provincial and Municipal administrations which are directly involved in the development and implementation of Regional programming;

professional development programs aimed at creating new jobs with the accompanying insertion of positions with new professional profiles in many participating institutions;

development of network services, collaboration between public and private entities in operating museums and related services, and outsourcing of activities that are not the principal functions of public administrations or the entities in their jurisdiction (promotion, communication, marketing, organizational and technical assistance etc.)

The Network, coordinated by Umbria's Regional government, is a model that offers an interesting subject of debate for regional administrations, especially in Italy, that are considering the development analogous projects.

### **Short description:**

For the past twenty-five years the Region of Umbria has favoured the development of a policy for a planned approach to the protection, restoration, study/presentation and promotion of its cultural heritage. A key concept of this policy is the Regional Museum Network: a network of museums and collections of local interest belonging to local entities which forms the basis of a program for the conservation and development of the social and economical value of the cultural resources, carried out on a territorial level primarily for the benefit of residents. The Umbrian Museum Network first took shape in 1990 with L.R. 35/90 *Norme in materia di musei degli enti locali e di interesse locale* (a Regional Law decreeing the norms of museums belonging or of interest to the local authorities, the first of its kind in Italy), which provided for the cataloguing, safeguarding and restoration of local collections, the upgrade and reopening to the public of museum ensuring their regular operation, and related services. In the last decade this law has obtained very positive results in terms of the number of sites of cultural interest opened, personnel employed, visitors, catalogues/books published and revenues from admissions and bookshop sales. All this and accumulative revenues from local museums of L. 11.913.922.000 between 1990 and 1997, while the total funding from regional entities to cover operating gaps over the same period amounts to L. 1.438.000.000. The application of L.R. 35/90 has allowed for the resolution of numerous

problems related to the operation of local museums and of those that will be turned over to local authorities from the State as the result of Legislative Decree 112/98. However, to achieve greater stability and productivity the Regional Museum Network needs to implement some changes in the near future.

### **Interaction, cooperation, partnership:**

Regional Bill (1999): *Sistema museale regionale. Salvaguardia e valorizzazione dei beni culturali connessi* (Regional Museum Network. Safeguard and Development of Related Cultural Heritage).

With this Bill<sup>2</sup> the Region of Umbria has taken another step in strengthening and developing the Regional Museum Network. The proposed law recognizes that:

as a whole local museums contribute to Umbria's historic and cultural identity it is in the interest of the Regional community that these museums be organized as a unified operating Network, because it allows for the economies of scales which are essential to ensure that, while maintaining costs at a sustainable level, each museum has at least the minimal resources need to operate and to peruse its function of safeguarding and developing the social and economical value of the cultural heritage.

Participation in the Network by Provinces, Municipalities and individual entities is of their own free will, and formalized by a special agreement; those museums and collections that choose not to participate continue to have access to public services and funds (though some funds are restricted to those who participate in the Network). In an effort to promote cooperation and collaboration among all the institutions operating in the Region the Network's **programming is established by a process of negotiation**. The Region acts as the fulcrum of a network of autonomous entities which has the participation of the Provinces and Municipalities which are directly involved in the development and implementation of Regional programming.

The Bill provides for a five-year **Regional Plan** for the Museum Network. The Region and local administrations develop and approve the Plan together with public, private or clerical owners of museums or collections. The Plan includes:

an analysis of the Regional situation;  
the state of each museum and/or collection;  
an outline of the annual program of activities, the undertaking of which enacts the Plan – the law defines how the program is to be developed, approved and implemented.

The Plan must be approved by the Regional Council, which does so with the aims of:  
identifying, so as to integrate then with the specifications of the Regional development plan, the specific objectives of the sector and their accompanying activities;  
determining the forms of organizational and functional cooperation which consent coordinated operations among the local administrations in an effort to establish a museum network and activate the Plan;  
establishing the criteria of the agreement between the Region and the owners of public, private, or clerical museums and collections in an effort to insert them in the Museum Network;  
defining the financial and organizational resources need to implement the outlined actions.

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<sup>2</sup> The Bill has been approved by Regional Council and it is currently awaiting to be passed into law by the Council

In assigning duties and tasks to the Municipal, Provincial and Regional administrations the Bill follows the **subsidiary principle** which promotes the notion that every possible duty should be attributed to the institutions which are closest to the citizens. The administrative duties related to local museums and collections are the responsibility of Municipal governments, with the exception of those museums or collections for which it is deemed, by unanimous consensus, that for the time being they are better served under the guidance of a higher level of government. For the museums and collections in their possession or under their guidance the Regional, Provincial and Municipal governments guarantee to meet at least the minimum requirements established for the safeguarding of collections, operations of museums and quality of services. Municipal governments identify projects to address their museum/collection needs and apply to their Province for funding to carry them out. The Provinces, by selecting which projects to support, play a determining role in the Network; by deciding what to fund they in effect guide and implement the portion of the Plan under their jurisdiction. The Region directs and coordinates activities employing its organizational and financial resources to achieve a unified Regional Museum Network without limiting the autonomy of the individual organizations that belong to it.

The Region distributes its funds or those it derives from the State or the European Union to assist the following activities:

the consolidation, reclaiming, restoration, remodelling and construction of buildings, building systems and equipment;  
restoration of objects;  
acquisition of cultural works for museum collections open to the public;  
operations of cultural entities;  
cultural activities;  
production of publications and other material relating to museums.

N.B.: funds for a), b) and c) are available only to those organizations that are part of the Regional Museum Network.

The Bill includes provisions for a **Technical Committee** made up of the pertinent directors from the Regional Council and Provincial administrations, representatives from Municipal administrations, the Umbrian Clerical Conference and private museums, and four university professors selected by the Regional Council. The Committee is established by the Region and assists the Regional Council in the identification of museums, collections and related cultural services of Regional interest as well as in guaranteeing the cultural and scientific quality of the Regional Museum Network.

The Bill also incorporates the following innovative aspects which have been part of Umbrian policy for some time:

**Suitability:** the tasks and duties that each entity will have to implement during the time span of the Plan are fixed at the outset and clearly stated in the Plan.

**Flexibility:** the Bill allows for annual adjustments to be made to duties and tasks of each entity as outlined in the Plan to allow for variance between projected and actual performance.

**Solidarity:** specifically it provides for collaborations between public and private entities for the co-management of institutions and museum services, with the intent of favouring development and operations.

**Outsourcing:** in pursuit of efficiency and effectiveness is encouraged that activities that are not the primary function of public entities be outsourced to specialized private entities.

**Specific and elevated professional standards** for all administrative and curatorial museum staff. The Regional Council defines the professional profiles, and associated training courses, of new staff for the museums and services participating in the Network, as well as providing skill upgrading and retraining courses for staff already in service.

The *Società Cooperativa Sistema Museale a.r.l.* (a cooperative that manages a museum network that spans Umbria and Marche) is a particularly interesting entity which incorporates the last three aspects outlined above. This Cooperative is a private company the purpose of which is to raise awareness of historic-cultural heritage by promoting it to tourists and residents. The Cooperative provides services (information, guided tours, promotional activities ect.) in a network of 35 entities and is also active in the organizations of concerts and exhibitions. It periodically publishes a newsletter/brochure (*Foglio di Informazione Periodica*) which lists the Cooperative's various activities, provides an updated schedule of cultural events, as well as providing a vehicle for those entities, public or private, that do not belong to its network to promote their activities. The Cooperative was founded in 1990 by graduates of the first program of professional training courses for "intramuseum operators" offered by the Region in 1989 in an effort to establish homogenous standard for the following services: visitor services and accessibility; collection maintenance; systems and building maintenance; cultural promotion; assistance to tourists and educational activities. The Cooperative had since developed independently of the Region; however, it is obliged to hire only those individuals who have completed the professional training courses for intramuseum operators, thereby creating an important employment opportunity for young people who graduate from the program. Between 1989 and 1998 seven editions of the professional training courses for intramuseum operators and one retraining course for personnel already working in museums have been offered. As these are courses financed by Regional professional development funds there is no set curriculum and the courses are programmed in a flexible manner which gives consideration to the needs of new museum structures. Thanks to a gradual differentiation in the areas of its competence, the Cooperative is now in a position to offer a wide range of services and runs a healthy consulting activity which includes clients from outside Umbria.

Another important initiative which developed from Umbria's policy of Regional planning is that of the **Museum for the City** (*Museo per la città*). An initiative funded by the Region and to be activated within the scope of the Regional Museum Network by the Municipalities which have a particularly rich cultural heritage that manifests itself in ways that go beyond museums and collections. It consist of "a place, in a location with high pedestrian traffic, from which specifically trained personnel attends to (...) measures to safeguard heritage as well as providing information to the public, assistance in making cultural entities accessible and in organizing itineraries which provide the participant with a real sense of understanding." Currently there are two Museum for the City in the development stage in Assisi and Perugia.

#### Other projects for strategic cultural development in Umbria

That programming through negotiation, specialized training, network services and collaboration between public and private entities are a unifying theme in Umbria's approach to cultural heritage is further evidenced by the following two projects:

The restoration and conservation of Umbria's rich cultural heritage has long been a priority . In 1975 the Region enacted a Pilot Program for the Planned Conservation of Umbria's cultural Heritage. This year the Region and local entities of Umbria, the Ministry of Culture, Confindustria (the industrial association) and pertinent Unions signed a protocol of



understanding for the creation of a Working Centre for the Conservation, Maintenance and Development of Umbria's Cultural Heritage. As Bruno Brascalente, President of the Region of Umbria, explained it is an innovative initiative, the first of its kind in Italy, for the protection, restoration, conservation, and development of artistic works, with priority given to those damaged in the 1997 earthquake. This initiative becomes part of the over all planning for territorial development and cultural tourism, that offer significant employment opportunities. Maintaining the Regional approach the Centre will actually be a network of three locations: one in Foligno, one in Spoleto and one in Narni.

In the protocol of understanding for the Pact on Culture between the Province of Perugia and its Industrial Association (Assindustria) the two entities recognize the importance of public-private cooperation, the development of promotion for the heritage sector and the production of traditional and contemporary arts as unique resources; it is stressed that "the creation of a network, of a circuit of cooperation between economic and industrial powers is integral to a process of promotion"; the partners "agree to collaborate on developing and implementing an overall coordinated and coherent plan of cultural promotion". In particular they "intend to develop cultural promotional packages in support of events which are promoted, organized and supported by the Cultural Branch of the Province of Perugia, cooperating to take advantage of synergies with each employing financial and/or organizational resources and defining strategies and actions for the promotion of the events through coordinated communication".

**SKOZK (Spoleczny Komitet Odnowy Zabytków Krakowa)**  
**Cracow Monuments Renovation Civic Committee**  
Agata Wasowska Pawlik

**Short description:**

SKOZK is the only organisation in Poland working on the basis of separate legal act dealing with the whole complicated problem of revitalisation of Cracow historical city centre. Actually thank to SKOZK activity the architectural substance of Cracow has survived. In the 90-ties, in post-communist reality, pioneering formula of SKOZK generated private funds to renovate Cracow monuments.

Cracow Monuments Renovation Social Committee was established in 1978 (SKOZK). Members of SKOZK work on a voluntary basis and are appointed and dismissed by the President of Poland. The Committee consists of consultants, outstanding members of Polish society and representatives of renovation circles: art historians, artists-renovators, architects, urbanists, also lawyers and economists. The main objective of the Committee's operation is the preparation and improvement of rules concerning allocation of the National Fund resources. The above is based on strategic annual and long-term plans, motions made by the owners, state and self-government renovation authorities' points of view, and Committee's own initiatives. The essential part of the Committee's work is monitoring and quality evaluation of conducted works. Projects which concern annual plans and reports, prepared by the Board of Cracow Monuments Renovation, are judged and corrected by problem commissions and the Committee's Presidium. Then they are approved by general meetings. The National Fund is the financial basis. Its resources, in the majority come from the central budget's donations, that are assigned by the Parliament and received via the Polish President's Office. However money coming from the budget of Cracow region and Cracow community are also vitally important.

**Wohl & Sein - Being and Wellbeing**  
a Basel museums project with new forms of cooperation between  
economic, cultural and political life  
Saskia Klassen

**Innovative Key-Points:**

It is very unusual that museums and other public institutions work together in such a big number and - among the museums - small and big institutions on the same project. Private financing of a cultural project on the occasion of a jubilee from a company as Hofmann-La Roche is not self-evident but luckily no more brand new. But the existence of a project-coordinator (Cyrill Häring) which was also responsible for the working conditions of the participants is in the nationwide context really innovative.

The same three points from above, big group of participants, working together of small and big institutions and the existence of a project-coordinator, are also the innovation from a management point of view.

This example is easily exportable in other fields or other regional contexts.

**Short description**

Under the title „Being & Wellbeing“ nine expositions were shown from June to September 1996 in seven different places in the city of Basle (Switzerland). Nine museums and cultural institutions worked together in this multifaceted and inter-disciplinary cultural project. What the exhibitions had in common was the overall context and the title, „Being and Wellbeing“. Apart from that, each exhibition was specific to its museum and bore the stamp of its creator. The project was financed by the private sector on the occasion of a company's jubilee. It had a two-years planning phase and an independent coordinator and project leader, whose organisational role was crucial to the development processes. It ensured, for instance, that spheres of competence were clearly delineated from the beginning: the museums and institutions were guaranteed freedom regarding what was to go into the exhibitions. This was made possible by the private-sector funding in the form of an overall budget under the responsibility of the coordinator. The success of the project, shown in the excellent quality of the exhibitions and the „wellbeing“ of their visitors, is the best reference for it as an example of a practicable approach to the sort of cooperation that is further needed.

The titles of the nine expositions and the Institutions in cooperation:

Revolution. Apothekerkunst und Industrieprozess“ (*Revolution. Pharmacie and industrial process*)

Pharmazie-Historisches Museum

*fremdKörper - corps étranger - Foreign Body*“ Videoinstallations

Museum für Gegenwartskunst, Öffentliche Kunstsammlung.

*Schmarotzer? Von Parasiten und Menschen (From parasites and human beings)*

Naturhistorisches Museum

*Wegzehrung. Pflanzen am Lebensweg des Menschen (Provisions for the journey: Plants along the human beings way of life.)*

Botanischer Garten der Universität Basel

*Mundwerk. Dem Gebiss auf den Zahn gefühlt (Mouth and teeth)*

Anatomisches Museum Basel

*Fundgruben. Stille Örtchen ausgeschöpft. (Found in the closet)*

Historisches Museum Basel

*Xundheit! Im Labyrinth der Gesundheit (In the labyrinth of helth)*

Karikatur & Cartoon Museum Basel zu Gast im Schweizerischen Museum für Volkskunde und Museum für Völkerkunde. (neu: Museum der Kulturen)

*Amulett. Vom Geheimnis der Amulette und Talismane*

*(The secret of charms and mascots)*

Pharmazie-Historisches Museum zu Gast im Schweizerischen Museum für Volkskunde und Museum für Völkerkunde. (neu: Museum der Kulturen)

*geheilt! Votivgaben als Zeichen geistiger Genesung*

*(Cured! Votive givings as symbols of mental recovery)*

Schweizerischen Museum für Volkskunde und Museum für Völkerkunde. (neu: Museum der Kulturen)

# **Zeppelin-Museum Friedrichshafen GmbH.**

Raymund Kastler

## **Innovative key-points:**

- museum operated by a private liability company;
- interactive visitor communication.

The Zeppelin Museum plc is one of the very few museum in Germany being operated by a private liability company.

The organisational structure enables the museum to act more flexible in financial and personnel matters.

The organisational split between collections being owned by a foundation and operation of the museum being done by a private liability company is highly exportable to different cultural heritage institutions.

## **Short description:**

After the destruction in the WW II the collections of the Bodenseemuseum and of the Zeppelin company museum were united and housed in town hall of Friedrichshafen. At the end of the 1980s it was decided to transfer the museum to a new location situated in the area of the former central railroad station of Friedrichshafen. Through this decision a new museum complex with around 4000m<sup>2</sup> exhibition space came into being, incorporating as well the history of Zeppelin aeronautics and a huge collection of fine arts. Additionally works of contemporary artists (currently an Otto Dix retrospective) and of scholars from the Zeppelin Foundation (currently Annelise Hermes) are displayed. Special exhibitions reveal a wide prospect from aeronautic history to the arts, often the two topics in combination.

In 1992, four years ahead of the actual opening of the museum, the Zeppelin Museum Friedrichshafen plc (abbreviation ZMFplc) was founded. This private limited liability company operates the museum, all the displayed objects being owned by the City of Friedrichshafen and the Zeppelin Luftschiffbau. Since the opening in 1996 the choice of the organisational construction proofed its success in more than in the financial way.

In 1998 the Zeppelin Museum Friedrichshafen was awarded the Special Commendation of the Council of Europe.

## **Staffing:**

The ZMFplc has currently 87 employees in all three divisions. Around 50 of them have permanent contracts, the rest being freelancers. Included there are a lot of employees with fractional employment. The contracts of the permanent staff is shaped in equivalent to the standards of the public administration.

According to choice of structure and being a private enterprise offers the ZMFplc a lot of possibilities concerning policies towards the staff.

The ZMFplc has a specialised endorsement. The ZM considers itself as world wide leading institution in the history of airship aviation, that is obliged not only to the ICOM definition of museums but also to the task of being a high standard cultural service institution. Due to fact of the early founding of the plc this endorsement has not been developed together with all the employees but by the management alone.

Communication within the ZMFplc is facilitated by a own intranet. Weekly meetings the so called jour fix among the branches and weekly meetings of the branch leaders are the bases of the internal stream of information. A monthly general meeting of all the employees functions as

platform of discussion and exchange of ideas. All decisions are made in their appropriate level of competence, according to the respective job specifications.

Ideas can be brought in at all levels and are discussed at the monthly jour fixes. The final decision lies in the hands of the management, after preceding project- and funding calculations. The realisation and the keptance of time and financial schedules of each project lies within the responsibility of each single project-leader directly responsible only to the management.

The outcomes of all decisions and projects underlie fundamental evaluation. Apart from questionnaires and evaluations of database there are feedback talks together with all participating partners and enterprises at the end of each project.

### **Interaction, co-operation, partnership:**

The ZMFplc co-operates with different partners, mostly from the local regional and international business world. For example:

- IBM
- ZF Friedrichshafen AG
- Technische Werke Friedrichshafen GmbH
- Hypo Vereinsbank AG

and others more

These co-operations are as well long-term partnerships as single project co-operations. The selection of partners is focused on which institution brings in the best know-how /skills matched to the museums targets, so the partners invest both human as well as financial resources. In contact with different profit enterprises the structural similarity of the ZMFplc proofed itself as extreme advantage in the acquisition of commercial project-partners and sponsors.

Multiple partnerships do also exist with different museums on national and international level ( e.g. Deutscher Museumsbund, Museumsverband Baden-Württemberg, ICOM and IATM), mostly in form of exhibitions. Additionally the co-operation with artists, private and public institutions is going to be enhance by the installation of a new foundation.

Other partnerships do exist e.g. with the University of Koblenz, where students were designing an exhibition called „Between Heaven and Hell. Aeronauts in the War“, together with the ZMFplc.

### **Institutional engineering:**

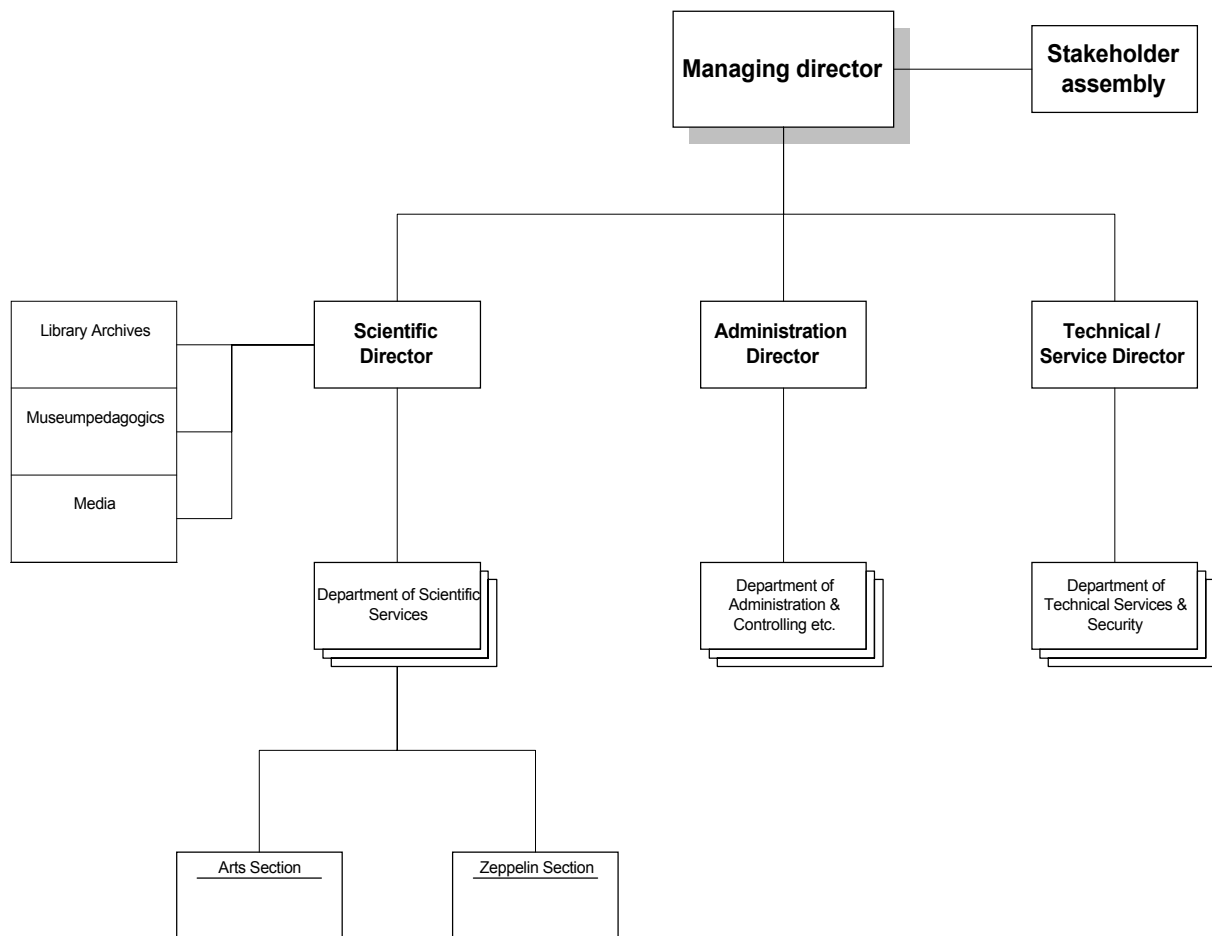
The ZMFplc is a limited liability company founded for the operation of the museum and is headed by a managing director. Stakeholders are different public and private institutions like the City of Friedrichshafen.

An annual report, being compulsory according to the German limited liability company laws, is published among the stakeholders and the management. The management accounts are also discussed by the Friedrichshafen City Council being the authority of the stakeholder City of Friedrichshafen.

The company is generally divided in three fundamental branches: Scientific Service; Administration Service and Technical / Security Service.

The department of Scientific Services includes the Zeppelin- and the Artsection. As a kind of staff position connecting different departments are the divisions musem-pedagogics, media and archive /library, standing directly under supervision of the director.

The equality of the different sections distinguishes the organisational structure of the ZMFplc from a more traditional museum. The director of administration is on the same level as the director of the scientific services.



The choice of founding a private limited liability company has a lot of advantages concerning the flat hierarchy and therefore the possibility for fluent decisions also in the funding sector due to not being bound to the restraints of public financial administration. This construction proved to be very efficient and effective especially for long-term planning. The chosen enterprise structure as a private limited liability company facilitates the contact to sponsors from different enterprises. A further advantage in this matter being that a high portion of the staff has long-term experience in working in different profit organisations. Staff management according to industrial standards and cost transparency are additional positive achievements. The new organisational structure allows high stability in planning and simplifies the self economy in special events, merchandising, lease and the selling of licences.

Towards classical museums there is the disadvantage of being not regarded as a proper museum especially at the first contacts. The ZMF plc operates as a museum in every sense of the ICOM's definition. In the case of the ZMF plc the tasks list has been enlarged by being a customer service orientated institution. This means a certain mentality or attitude shown by each of the employees including the management.

Economic conditions have to be considered even in contents matters. Since the work of the different departments of a museum is high quality work it also represents an economic value that has to be considered in terms of entrance fees.

The business capacity amounts including depreciations around 8 Mio DEM (Annual Budget 7.9 Mio DEM). In the last business years the ZMF plc reached 80% self financing according to the report of the ZMF plc's accountant. The rest being funded from public subsidiaries, primarily from the City of Friedrichshafen, and others.

The ZMFplc's income results from entrance fees (80%), plus funding from lease of rooms, lease of the restaurant and museums-shop and from royalties (the museum's logo). The last being just a small sum.

Controlling plays an important part in the ZMFplc's financial planning. According to the management efficient and effective planning and management of projects would be impossible without it. Controlling is also used to gain comparative figures in order to make midterm planning easier. (The controller of the ZMFplc has a long-term experience in this field due to an career background in profit organisations.

As a basic philosophy all the non core activities of the museum are out sourced. E.G. in the division property management and Technics only the neuralgic positions are in hands of ZMFplc's own employees. The same is used also in other departments like media, where specialist enterprises are commissioned from project to project. The museum's shop and the restaurant are also operated via outsourcing.

The overall target of the ZMFplc is to make the museum's work as efficient as possible.

### **Strategies towards the public:**

The trend to museums as places of experience is not considered as a contradiction to the task of imparting knowledge by the ZMFplc. The main task is the efficient information, that in the case of Zeppelin aeronautics is inevitably connected with emotions and experiences, that are carefully cultivated by the museum's management.

The ZMFplc has achieved over the last years an excellent national and international reputation and placed itself in the ranking of local and regional cultural institutions. Visitors from the region still remain the lesser part of the museum's public, but the institution is well socialised in the surrounding.

The target groups of the ZMFplc are multiple and include all levels of age and education.

The communication with these groups and the public in general is based on press-information, flyers, posters concerning the local and regional level. The supra-regional level is served, by radio and tv spots advertisements and the internet.

The ZMFplc Web-site host a speciality in communication with the target public, called the „count online“ concerning a future exhibition about the life of Count von Zeppelin. This interactive site offers the user the possibility to shape an exhibition from the visitors side in collaboration with the museum. This innovative initiative of the ZMFplc allows the visitor to switch from a simple consumption of offers and to become to a responsible partner in the conception of the museum's exhibition.

Additional the ZM offers educational events and uses new technologies in all its exhibitions.

From the foundation the ZMFplc incorporated departments for didactics, a separate marketing department and a section for PR. According to the opinion of the management PR has primarily a service function subordinated to the settings and objectives of the museum ( in the ZMFplc PR is used according to the slogan „do good deeds and talk about it“).

The marketing concepts of the ZMFplc are based on specific studies, most of them basing on MA theses.

The ZM has annually about 350.000 visitors. About 33% of them came to Friedrichshafen especially because of the ZM. Each of them spending about 60 DEM in Friedrichshafen.

Annual visitors evaluations are used by the management to control the efficiency.



# **The Pathways of Innovation: Itineraries and Directions for Travellers**

Luca Dal Pozzolo

With respect to the four lines of investigation indicated by the research project ( A- Interaction co-operation, partnership, B-Institutional engineering, C- The policies towards the public, D-The policies towards the staff), the case studies offer a wide variety of solutions. Comparative analysis is facilitated by the expository compactness of the case studies, and readers are left to evaluate the set of instruments, the assumptions and the solutions which emerge from each topic in all the cases, with no further comment. It is hoped that discussions at the seminar between those who were actually responsible for the innovations examined will offer further detail on the limits and contexts of applicability, on evaluation criterion and on possible further developments. As further stimulus for debate, we attempt in this final chapter to identify several of the problems which cut across the single case studies, beyond their specific nature. We have organised these issues into five different "itineraries". We intentionally avoid terms such as "trend" or "prospects" or "lines of development". As pointed out previously, the results of this research do not allow us to generalise about situations or to present a final balance sheet. They do allow us, however, to suggest several itineraries through a number of problems and through many of the issues raised in the case studies.

With the term itinerary we wish to emphasise the subjective component of the traveller. An itinerary indicates both a set of travel plans as well as a means of travel, and these take into account the stop-overs, the quality of the locations and the interests of the traveller. Usually there are many itineraries to choose from which connect the same two places. Consequently, the five itineraries presented below do not present an exhaustive list of the possible routes which could be suggested for the collection of case studies.

In our case, the five itineraries do not always make use of clearly marked roads. They often require the use of lesser-known routes, of paths whose outline is not always easily recognised. This fact underlines the subjectivity of the person who proposes the itinerary, and at the same time and at least to some extent, implies certain expectations about the traveller's attitude and capabilities. It would in any case be strange if a trip towards innovation made exclusive use of well-marked highways. It will surely have been remarked that some of the innovations presented in the case studies have not yet been the object of evaluation, due to their very recent date. To venture onto unknown paths is thus necessary, but whether in the future these itineraries will rely on clearly recognisable pathways or whether they will become generalised tendencies (or perhaps they will on the contrary only take effect in certain niches) is today a topic of debate.

## **Itinerary 1: Crisis as an instrument of innovation**

The attempted definition for "innovation" offered by the research project as a "certain kind of answer" given by an institution, a system or an individual to a pressure urging to change, already contains the concept of crisis as a catalyst for change. Nonetheless, some of the cases presented prove how a state of crisis, a sort of initial check-mate, can serve not only as a reason for the innovative process, but can itself become an instrument of innovation, encouraging a total rethinking of the very mission of the institution or museum itself.

One such case is the Deutsches Museum Munchen, where the factors of crisis became elements of communication towards the public and the society, and an occasion for redefining the role and

the tasks of the museum with respect to civilised society. In this case it was not just a question of overcoming difficult conditions by resorting to alliances with other institutions or private organisations, but the use of the situation of crisis as an opportunity for reflection on the key functions of the museum, an occasion for an overall reconsideration about what targets to set for the museum, with what aims and what means.

With some obvious differences, the Museo Leonardo di Milano also sparked an overall transformation which goes well beyond alliances with privates and which influences even the collection of the museum itself, as well as the means of presentation and the relations between the local society, the territory and the museum.

Lastly, it seems only appropriate to mention the Ars Aevi project, where the meaning of the word crisis in post-war Sarajevo takes on connotations which are much less metaphorical than in the preceding cases: here, too, in very concrete terms, there is a rethinking of the significance of art and of the museum as a process of re-acquiring a civilised tradition of living together, of a meeting of different cultures which is becoming more and more pressing in light of spreading violence.

## **Itinerary 2: From the Object to the Subject**

Many museums today seem far removed from the first Wunderkammer; they rely less and less on astonishment or wonder about an object which has simply been placed on display. The wealth of information offered is increasing, and so is the importance of the relation the object held (or holds) with its context: from the things themselves we have moved to the relations among the things. This does not necessarily lead away from the positivist conception of the 19th century museum which was seen as a volume of an encyclopaedia of knowledge and of memory. Additionally, it is not only Science Centres and multimediality which are leading in other directions, towards displaying fewer objects and furnishing occasions for experience, but in some cases the object has practically disappeared in favour of a “subject”, of the visitor, of the visitor’s experience and memory. The cases of the Ragged School Museum, and also somewhat that of Croydon, are emblematic in this sense. Local society is the subject which is self-represented in the museum. The public, or better yet, the publics, the individuals with their different backgrounds and ethnicities are at the centre of interest. The museum becomes a place for confronting different points of view, it becomes the place for the “construction” of identity by means of a dialectic confrontation of stories, tales and individuals, it is an activity which creates identity. One does not just recognise their own reflection in an organised archive of knowledge and culture which has in some sense been objectified and detached from individual and subjective identity. Instead one contributes one’s own story, one’s own experience, one’s own way of interacting with the subjectivity of others and with the context. In this case it is no longer possible to talk about a collection of objects, but neither can one manage to collect subjects.

## **Itinerary 3: From Still Life to Live Performance**

Another way of expressing the idea is this: not just to present but to represent things and how they live, to offer occasions for experiencing “inside” or “among” things using anything from multimedia to live performance. Not by chance a similar assumption characterises several science museums and many archaeological parks, in the effort to recreate an environment, whether it be a scientific experiment or a Roman camp. The diachronic axis - that which came before, that which came after, and the space occupied by the object in this temporal succession - integrates with the synchronic axis, such as an experiment, or a reproduction of an experience

in the totality of its relations in a given moment. Next door to the museum a festival develops, an integral part of the museum itself is its communication channels, like in Carnuntum, or in the telling of the daily life during the guided tours of Empuries. This is not a mere attempt to liven the presentation of certain subjects as an alternative to charts and explanatory notes. Instead it seeks to communicate something else which otherwise cannot be explained, such as the emerging result of a scientific experiment or the spatial sensation of everyday life in a place constructed 2000 years ago.

#### **Itinerary 4: Conservation versus Use - Negotiating the Equilibrium**

The thankless task of reconciling protection and conservation with use, access and possibilities for visits has traditionally fallen to the institutions who oversee the museums, archaeological sites, monuments and parks. The balance among the different functions are not the result of a single equation, but are the fruit of an overall evaluation which takes into consideration a number of different factors: the characteristics of the material displayed, the modality of use, the availability of space, the number of visitors admitted per unit of time etc., etc. It is just as obvious that in such complex issues the points of equilibrium can be numerous, and in any case, no matter what the compromise reached, the situation tends to evolve continuously under the pressure of change from even a single element (a new acquisition, a successful exhibit, a peak in admissions). Even more interesting, then, are the cases which completely separate protection and conservation from use and public relations, delegating the respective responsibilities to different entities, in some cases even to different organisations, as is the case with Carnuntum, Schonbrunn and the Zeppelin Museum, and to a lesser extent of Empuries, the Sistema Museale Umbro or the Castello di Rivoli, where specific functions and services are entrusted to organisms created especially for that purpose.

In these cases, the responsibility for achieving a satisfactory equilibrium rests in the negotiations within the program, in other words, with a dialectic process of give and take concerning the modality with which to render compatible different needs. In the experience of Carnuntum, decisions about the program are discussed by an Advisory Board which represents a variety of interests and responsibilities. The reinvestment of resources derived from entrance fees into excavations, protection and conservation proves that such a process can profit from the apparently contradictory elements and can obtain positive feed-back contributing to overall improvement of the organisation.

#### **Itinerary 5: From Ivory Tower to Network**

This itinerary touches on all of the case studies to some extent, and serves as the basis for much of institutional engineering. The institution, that is the museum, opens to gather the contributions of other members of society for two reasons: to co-ordinate services and functions with other institutions in an adequate economic dimension, which is often not achievable by a single institution (see the cases of Sheffield or of MuSis); and to demonstrate its authentic relationships with the territory and with a system of historically linked cultural patrimony (such as the Sistema Museale Umbro). In other cases it is the network of collaborations and participations itself which make up the mechanism for the accumulation and growth of the collection as, for example, the Museo Leonardo, the Deutsche Museum Munchen, of Being and Well Being and Ars Aevi in Sarajevo. In other cases, becoming a point in a network of tourist itineraries consents implementation of policies towards the public, increases in the number of visitors and - beyond the direct economic effects - taking on a more visible and important role in the local community.

Heritage Island represents an interesting case in its singularity. It is the network project itself which contributes to the definition of the requirements and necessary services in order that a site, a monument or a museum can represent a point in the network.

In all of the cases examined, participation in a network proves not to be an expedient means for passing on problems to a higher level, but instead to profoundly influence institutional structures and organisations, scientific planning and relations with the public and the local community.

## **Remarks about the Five Itineraries**

The five itineraries seem to indicate a shared characteristic in that they are transitional phases away from institutions which in some way were single, towards “systems” or towards constellations of “functions”, of interests, of missions which are interrelated but which are provided with a certain amount of autonomy within the single institution. One can no longer speak of a single public, but of different publics. As a consequence, the institutional missions are well-articulated and diversified. Ownership of the objects is shared by public and private, as are the various participants in the different forms of management. Opening to a territorial network implies co-ordination of the policies among the subjects of different interests and finding points of convergence and of composition.

In a certain sense the institutions are similar to the networks, connecting this constellation of limits, opportunities, resources, and members of society, while their activities and their institutional missions manifest themselves as the results of a myriad complex of interaction.

If all of this represents a currently unfolding dynamic, then the consequences on professional training and on employment criteria seem significant. Side by side with the specialists of each individual discipline, the need for professionals capable of creating systematic connections among the various competencies, with technical expertise in the different fields, the capacity of mediation, negotiation and the design of programs, becomes crucial even in day to day management. This professional figure is strikingly similar to that of the Renaissance humanist: a scientist, a well-read scholar who is versed in many disciplines and is capable of discussion with different authorities and different members of society.

# The Seminar

# **The Programme**

# MIMEH

## Models of Innovative Management in European Heritage

### Final Seminar

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4-6 November 1999  
Turin

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**Thursday, 4 November 1999 Archivio di Stato, piazzetta Mollino, Turin**

#### OPENING SESSION (Plenary)

14.00 – 14.45	Registration	
14.45 – 17.45	Welcome addresses	Giampiero Leo, Regione Piemonte, I Compagnia di San Paolo, Turin, I
	Introduction	Ugo Bacchella, ARTLAB, Turin, I
	An innovative path for a new collection	Enver Hadziomerspahic, Ars Aevi, Sarajevo, BiH
	Culture and tourism	Diane Dodd, consultant, Barcelona, E
	Heritage, territory, identity	Luca Dal Pozzolo, ARTLAB, Turin, I
	The role of a science museum within the local communities	Domenico Lini, Museo della Scienza e della Tecnica Leonardo da Vinci, Milan, I
		Mario Verdese, European Commission, DG XIII, Brussels, BE
	Trends in management of heritage in USA	Dan J. Martin, Carnegie Mellon, Pittsburgh, USA
18.00 – 19.00	Exhibition: <i>Leonardo e le magnificenze del Sei e Settecento della Biblioteca Reale a Torino</i> Biblioteca Reale	
20.30	Dinner (Arcadia, Galleria Subalpina. Piazza Castello)	

Working languages English/Italian

## Friday, 5 November 1999 Castello di Rivoli – Museo d'Arte Contemporanea, Rivoli

9.30 – 11.00	<b>PLENARY SESSION</b> <b>Introductory Reports</b> <i>Chair</i>	Alberto Vanelli, Regione Piemonte, I
	Interaction, Cooperation, Partnership	Raymund Kastler, Oesterreichische Akademie der Wissenschaften, Wien, (ICCM Group) A
	Institutional Engineering	Ugo Bacchella,, Artlab, Turin, I Enrico Bellezza, Notary, Milan. I
	Policies Toward The Public	Judi Caton, Arts management consultant, GB
	Policies Toward The Staff	Mark Hilton. Sheffield Museum, Sheffield, GB
		Marcello Pacini, Ministero per i Beni e le Attività Culturali, Rome, I
11.00 – 11.30	Coffee break	

Working languages English/Italian

11.30 – 13.00	<b>WORKSHOP GROUPS 1,2.3 and 4</b>	
	1. Interaction, Cooperation, Partnership	
	<i>Moderator</i>	Cyrrill Haring, Heritage consultant, Bern, CH
	<i>Rapporteur</i>	Danielle Cliche, ERICArts
	2. Institutional Engineering	
	<i>Moderator</i>	Walter Santagata, University of Turin, I
	<i>Rapporteur</i>	Christopher Gordon, English Regional Arts Board, GB
	3. Policies Toward The Public	
	<i>Moderator</i>	Petra Bohuslav, Carnuntum, A
	<i>Rapporteur</i>	Lidia Varbanova, New Bulgarian University Sofia, BG
	4. Policies Toward The Staff	
	<i>Moderator</i>	To be defined
	<i>Rapporteur</i>	Saskia Klassen, Historisches Museum Aargau, Bern, (ICCM Group), CH
13.00 – 14.00	Lunch	
14.00 – 16.45	<b>WORKSHOP GROUPS continue</b>	
17.00 – 19.30	Transfer by bus to the Palazzina di Caccia di Stupinigi and visit to the exhibition: <i>I trionfi del Barocco. Architetture in Europa 1600 - 175</i>	
20.30	Transfer to Turin and dinner ( Da Giuseppe, via San Massimo 34)	

Working language: English



**Saturday, 6 November 1999 Castello Di Rivoli – Museo d'Arte Contemporanea**

**PLENARY SESSION**

10.00 – 11.15 **Part 1 - Report back from workshops**

*Chair* Effie Karpodini, ICUSEM, Athens, GR

*Rapporteurs* Danielle Cliche  
Christopher Gordon  
Lidia Varbanova  
Saskia Klassen

Discussion

11.15 – 11.45 Coffee break

11.45 – 13.15 **Part 2 - Round Table: How can the training institutions meet the new needs and challenges?**

*Chair* Herwig Poeschl, ICCM, Salzburg, A

Benedetto Benedetti, Scuola Normale, Pisa, I  
Effie Karpodini, ICUSEM, Athens, GR  
Michael Quine, City University, London, GB  
Andrea Zonin, St. Petersburg, RUS  
Dennis Rich, Columbia College, Chicago, USA  
Daniele Lupo Jallà, City of Turin, I  
Isabelle Schwarz, ENCATC

*Rapporteur*

13.15 – 13.30 Conclusion and summing up To be defined

13.30 – 14.30 Lunch

14.30- Visit to the Contemporary Art Museum (Permanent collection and temporary exhibitions)  
Individual transfer by shuttle bus to Turin

Working languages: English/Italian

## **Introductory Reports**

# Interaction, Cooperation, Partnership

Raymund Kastler

For all of you working in the field of Cultural Heritage these words Interaction, Cooperation Partnership sound so familiar, clear and well known. Especially museums and scientific institutions have a big store of experience in this matter. Scientific cooperations, joint ventures in expeditions and the most common form the exchange of exhibitions and collection items for special exhibitions are the daily bread of successful work especially in museum sector. To a somewhat lesser extend interactions, cooperations, and partnerships were used in other fields of Cultural Heritage institutions, like historic monuments, castles etc.

Generally these actions were transformed either within the similar branches of Cultural Heritage institutions or within the scientific community. These interactions will also in future be the backbone of successful work in the field of Cultural Heritage.

So is there anything more to say about and why is there a need to deal with such a well known long experienced and multiply practised matter in a seminar devoted to innovation in Cultural Heritage management. Joint forces and unity means strength are to well known slogans as to attract any further interest.

The following statements do not present the resume of an academic transeuropean research but some thoughts, comments, due to the restricted time sometimes just surface glances, developed from the collected cases studies of the MIMEH Research Team in order to spark deeper discussion in the next time.

## 1. The background of interactions, cooperations and partnerships

The core of partnerships, interactions and cooperation's the motivation for of all these initiatives can be generalized, like in the case of the insect pained crocodile, to be either the respond to some kind of external demand, threats etc. or the realisation of an internal target.

\* Whatever the reason might be, the search for partners, co-operators and so on inflicts first a clear analysis of the problem of the task, problem, target or assignment to deal with.

What is the problem, target etc. exactly

How came it into being

Why is it important for me

Is it a, short- (single project) mid-, long-term task - Shall the solution be a short-, mid-, or long-term one

What's connected with it (environmental monitoring, according to the task on local regional and higher levels) This monitoring of the environment also touches the point of innovation. Innovativeness of partnerships can as the research documents only matched towards the setting of a certain project what means innovative in one geographical or topical framework doesn't mean the same in another.

\* The second monitoring should be an analysis of the institution itself.

Strength Weakness Abilities Threats analysis to uncover the deficits and resources of ones organisation focussed on that certain task. The legal status of a Cultural Heritage institution seems to have no minor importance in influencing the possibilities to form interactions and cooperation's.

The precise analysis of these points accordingly designs a first profile of the demanded partner and helps to determine the institutions own position in the partnership. Clear definition of roles, positions, rights and duties in cooperation's is like in team working the base of mutual trust, is the core of successful work.

## 2 Cooperation design, possibilities chances and risks:

Monitoring of the institutions environment (local regional and higher levels) should uncover a first spectrum of potential partners. The choice of partners is mostly depending on the aim of the

cooperation. Partnerships, co-operations and interactions in the field of Cultural Heritage offer a great freedom of creativity. Apart from single target short term partnerships there are a lot of different possibilities.

Outsourcing - in sourcing partnerships:

Scientific cooperation's are to well known to mention here in greater length.

Partnerships with universities in Form of offering topics for Master- and PhD thesis supply high quality know how at a comparable moderate price. A certain drawback is the time factor this solution seems more practicable for non-short termed projects.

The open-air museum Kiekeberg near Hamburg, GER cooperates regularly with the University of Hamburg's economical department in order to develop and check different economic sections of the Museum through PhD and Master thesis.

Similar practise was used by the Zeppelin Museum, Friedrichshafen GER in gathering their informations for the marketing concepts.

The reverse way the is used by the Deutsches Museum München in cooperation with the Technical University, the University of Munich and the university of the federal Armed Forces in the Munich Centre of Science and Technology. Here the Expertise of the Museums Curators and Personal is used to provide an inter university education.

This capital of internal expertise and know how is also used in consulting work for other international museums.

The high professional expertise of Cultural Heritage personnel used not only for clients in Cultural Heritage institutions but also on the market is a potential still to be discovered by different partners.

Another possibility of partnerships to use resources outside a Cultural Heritage institution is the recruitment of volunteers.

Though cultural institutions in the USA and to a certain lesser extant in England rely heavily on the use of volunteers in their services, the socio - cultural background for the readiness of private involvement in public services, differs heavily from the situation in Continental Europe and can therefore not directly be compared.

On the other hand seems that continental European Cultural Heritage institutions seemed also rather reluctant to open their houses for volunteers.

While the first pool to look for volunteers seems naturally to be an association of friends of a certain Cultural Heritage institution, there are quite different experiences made with that. While in the open-air rural heritage museum Kiekeberg can draw a positive account in recruiting from their support association, in the case of the Deutsches Museum Munich this proofed to be less efficient than recruiting volunteers from outside the museums environment through a broad media campaign in a case of urgency. The continuous recruitment apart from media catching situations of endangerment for Cultural Heritage institutions again requires different approaches and is more time consuming.

Clear contracts about rights and duties of volunteer service turned out to be an essential tool for successful work not only outlining the conditions of service towards a future volunteer but also internal towards the staff in order to prevent frictions.

To what extent and under which conditions European Cultural Heritage institutions realistically could rely on volunteer support seems worth discussing.

## **Networking**

Since a round the last 20 years networking seems to be one of the most tried form of interaction in the field. So networking doesn't seem innovative at all. But also here the degree of innovation relies mostly on its setting.

Single business networking

Even networks of the same business can offer innovative aspects. In the case of the DMM's initiative ChEMISTRY for Life international networking was literary taken, by each member producing a didactical display for the joint initiative. Clever use of one of today's core topics (another way of using an environmental monitoring) the benefits and risks of chemistry secured not only public awareness but also financial funding from proponents of the chemical industry and the EC.

Geographical non single business networking

Networking on a geographical base currently shows a renewed attractiveness, especially against the EC declared policy to strengthen the cultural and economic importance of regions in the European context.

One Example of interregional regional cooperations using this environmental advantage is Arge Donaureigen, a partnership formed by the leading touristic sensations along March and Danube northeast from Vienna. Among the members are as heterogeneous Institutions as the Archaeological Park Carnuntum, the Danube Pastures National Park, a Safaripark, historic residences in the Marchfeld, the regional winegrowers association as well as gastronomic and tourist enterprises. The common base for this marketing and PR collaboration, funded by the EC-INTERREG Programme is the high quality services offered by its members and is targeted to establish the trademark in the national and international tourist market.

Regional Networking and cooperative use of Resources:

Regional networking also became interesting especially for smaller Cultural Heritage institutions:

These regional networks exist on different bases:

\* In the case of the Sistema Museale Umbro a joint initiative between Cultural Heritage institutions and the state run tourism agencies, public legislation built the foundation for joint initiatives in keeping, promotion and interpretation of Umbria Cultural Heritage or beni culturali.

\* The 1981 founded Wallis Regional Museums Cooperation is a county initiative in order to centralise as much services as possible in order to maintain the decentralised Cultural Heritage offers.

\* Based on a private initiative through the association Musis is the Cultural cooperation Ennstal in Austria, covering different Cultural Heritage institutions in the Ennstal region. Similar cooperations initialised by the county government are planned for the rural Cultural Heritage institutions in Salzburg County (Austria) in the near future.

These cooperations open up a new dimension of networking:

Instead of mere information and or exhibition exchange, joined PR and marketing campaigns to establish a common market, these initiatives cooperate very tightly together in the daily work. This starts from collective acquisition of office supplies in form of material pools, to job splitting for specialised personnel like conservators etc.

In the case of MUSIS expertise pools with mutual consulting of the members shall professionalize the use of human resource base among the cooperation's members. Additional specialised certificated vocational training in different fields of museology, customer service and basic management are offered especially designed for the needs of the up to now mostly non qualified personnel of the small Cultural Heritage institutions.

Cooperative acquisition (museum shops), job sharing (building and maintaining of a free lance expertise- pool) and joint ventures in personnel training could also be an idea for heritage institutions at a local communal level.

If the cooperation is targeted on a limited market like most cooperations for Cultural Heritage institutions do, membership in a long-term geographical network enhances a higher degree of specialisation. A specialised institutional profile or even a Single Sale Position for the individual members becomes a necessity in order not to be one in a row.

The core of such as SSP is for a museum not only how to present but also what. This point needn't to be exclusively a point of concurrence but also one of interaction.

This question touches the long neglected and much famed sector of collection policies, here especially of museums.

Since in the Netherlands the management and conservation of the public collections even after the museums have split off, remains in the public responsibility new ways of collection policies are currently sought and tested. The Collectie Nederland, a general national collection archive is responsible to develop an assignment diversification together with the different partner institutions.

The aim of such an initiative is that not each provincial museum needs to have the same representative collection of new art or ethnological museums present all the World's cultures.

Is such an attempt really an alternative or just a cheap way to further restrict the acquisition of objects and a dreadful cut to the objectives of museums in general?

Could cooperation, partnership and interaction also develop solutions in that field?

How about cooperating also in collection pools? What could be the advantages / disadvantages of such a partnership?

A different situation concerning overlapping collections or more generally Cultural Heritage offers is concerned in case of community or local museums whose main aspect is local identification and community building of such a system. On which levels local regional or national could such a system make sense.

### **Social interactions**

It is generally accepted that Cultural Heritage institutions not only necessarily museums alone, are in their social environment places of identification for social groups as well as for individuals.

This is a huge field for Partnerships, interactions and cooperations: Just to mention a view.

\* The WUK - Schönbrunn-Project, Vienna Austria: In 1986 the Vienna Werkstätten und Kulturzentrum, a socio-cultural centre started with the Schönbrunn Residence, Austria's main tourist sensation in Vienna, a project for vocational training centred on socially handicapped youths from fringe groups. It offers youths the possibility under social pedagogic care to proceed in an apprenticeship as painter, with special training for historic buildings.

In exchange the youths cover up a lot of smaller or extremely time consuming work that commercial painting enterprises are only willing to fulfil at a much higher price.

The project is basically funded by the ESF (European Social Fund) and AMS (The Austrian federal employment office). Even after the privatisation of the management of Schönbrunn Residence in 1992 this project continues successfully. The Schönbrunn management plc takes a lot of interest in this partnership and supports it through placing rooms in the area of Schönbrunn residence at disposal for free. Additionally the Schönbrunn plc covers all the running cost and 2/3rds of the salary for the master doing the vocational education of the youths.

\* Another example in this category is the open air museum Kiekeberg, Germany, a rural heritage site with 33 historic buildings and 11.000 m<sup>2</sup> land. In partnership with the Lebenshilfe Lüneburg e.v. (a private association for the handicapped) mentally handicapped people have the possibility to work either in gardening or in the workshops.

\* Finally Museums in Finland used successfully their collections for language courses and for integrative work with foreigners, finding out that people socialise much easier in an foreign surrounding through contact with objects that somehow look familiar to them.

What is the gain for Cultural Heritage in projects of this kind and what's the use to mention them in a seminar concerned with Cultural Heritage management.

Cultural Heritage today is threatened not only by the lack of funding but also from a lack of acceptance as being useful to society apart from relaxation as one but not the most important item in the spare time sector.

Training and participation in a variety of cultural activities are according to an EC commission staff Working paper, increasingly emerging as a significant tool of social integration.

Cultural initiatives to conserve heritage can thus achieve a number of complementary objectives: providing vocational training, improving social integration and reasserting the value of manual labour.

Cultural projects can thus motivate young people to redefine and resume their place in society and in the world of work, and through the discovering of their heritage to renew their ties with their cultures history. This is not only true in rural areas where enhancing the heritage can contribute to the economic and social revival but much more in urban areas, where there is a more evident lack in social integration. Europe's Cultural Heritage offers a lot of possibility in community building as the clock tower museum at Croydon, London GB demonstrates.

Interaction in social projects could therefore be a way to regain acceptance of heritage in society. Social projects in partnership with Cultural Heritage institutions not only enhance acceptance of Cultural Heritage as important for the social structures of a society, but could also function as an argument against shortcuts in cultural funding in order to avoid reductions in social expenses.

A crossover of species

As already mentioned in the section of networking, interactions with different kind of institutions do offer a lot of possibilities; this also is true in partnerships and cooperations with different types of Cultural Institutions apart from regular networking.

A special form of cooperation - interaction is the case of the Swiss Being and Well-being initiative. It was realised through seven thematically heterogeneous museums and institutions in Basel, where a high density of cultural institutions generates a lot of concurrence even on a market crossing the borders to Germany and France. The project consisted of nine different exhibitions around the general idea about the questions of well being leaving the institutions free in their interpretations of the topic, but with a common publication, a common marketing, PR- and Advertisement line as well as joint accompanying events.

In order to secure the success of the project the installation of an external coordinator and moderator, who also was in charge of the budgeting proved to be a necessary decision in order to ease the inevitable concurrence in budgeting the single projects. For example the organisational plan and the projects overheads were discussed in an open process, where as the single project funding was part of individual consultations.

The most outstanding element of this project is that the initiative and the funding to join these competing institutions came through an external client from the commercial sector (Hofmann La Roche) celebrating the centennial.

Through the external impulse and the given topic the Being and Well- being project is quite multidimensional not only another sponsoring initiative.

Being and well-being allows us a short glance at cultural heritage and commercial partnerships.

There seem to be much broader fields than tourism and the lease of exhibition halls or even heritage lease, like the Arts Centre in Southampton performs it.

The trend of not only merging culture and economy but also of aestheticising economy can be traced in expositions like the art of the motorcycle, a joint venture of BMW and the Guggenheim foundation in New York. (The same company denied sponsoring an exhibition of ancient transport years ago with the argument of having now backwards orientated interests.)

In a current EC commission working paper the economical value of Cultural Heritage especially in connection with the multimedia industry is stressed.

Is this trend also covering classical cultural heritage. What kind of partnerships could that be?

And how about the maintenance of quality?

Returning back to partnerships with different cultural fields, an untypical example for joint ventures offers the interaction of the Deutsches Museum Munich and the Falkenberg Theatre School. Born out of shortages in the schools requisite stores for a Project on G.Hauptmanns Weavers this led to playing Theatre in the Museum.

Another possibility realised in different Technology and Science museums is linking arts and Science thus providing a broader understanding of the social and cultural setting of different Developments in Technology and the Arts. As an Example one could mention cooperations of the Arts and Technology collections in the DMM Schleißheim Aircraft wharf e.g. the Exhibition of Flugsulpturen by Chr.Bergmann, or in the case of Works from Paul Klee being deciphered as resulting in wartime experiences of aeronautics. Comparable projects were realised by the Zeppelin museum, Friedrichshafen.

Cooperations of that kind have the possibility to sensitise new sections of the public for the Cultural Heritage.

Connecting heritage and contemporary arts, architecture etc. in partnerships and cooperations like seems to be another way to stress continuity of time but in the same moment to illustrate also the differences of the chronological settings.

Interactions of that kind also show clearly that Cultural Heritage is not a terminated development but is a continuing process of adding and replacing. (Even Roman Buildings where brand new and disputed at their time). The reminiscence and acceptance of the processual character of a Cultural Heritage should not be forgotten in discussions about especially projects that have the rebuilding or reconstruction of Cultural Heritage as their aim.

The process of replacing seems double problematic in cases of traumatic loss of heritage as it is dealt in the project Ars Aevi, building a new Cultural Heritage for Sarajevo

Partnerships with clear aims, corresponding to all the partners needs with outlined rolls, even with unconventional partners but with care of their quality are an important element in the innovative Management of Europe's Cultural Heritage.



# Institutional engineering

Ugo Bacchella

At the very early beginning of MIMEH, institutional engineering was considered every process of redesigning and changing the legal and financial institutional framework of heritage institutions.

It seemed soon advisable to widen our scope for two main reasons:

1/ in many cases no substantial change had occurred in terms of ownership and governance, that is the legal and financial responsibility for an institution, but simply contracting out some services had a strong impact on the whole institution

2/ the borderline between institutional engineering or as some prefer to call it institutional planning, and redefining the organizational models is unclear to many and in many cases, as emerged already during the research process and conference on the Privatisation of culture, Amsterdam 1997.

These notes take therefore a wider point of view that the redesign of institutional framework and includes:

- the motivations and goals heritage institutions researched have in their process of changing both their forms of governance and their organizational models.
- the forms adopted
- the key factors of success
- a list of questions as an input for the debate in the workshop, the round table and possible developments of this pilot project.

## **The goals**

The motivations and the goals for reviewing the institutional framework and the organizational model seem to fall under three categories:

### *economic*

- cost efficiency
- increase of the range of services
- diversification of funding sources
- reduction of public expenditure

### *not economic*

- improvement of management
- enhancement / empowerment of the staff
- improvement of quality of the services
- inflexibility of local authorities structures
- stimulation of innovation and technological development

### *socio-political*

- involvement of communities or specific target groups

## **The forms of the change**

### **Outsourcing / contracting out**

The heritage institution keeps the control on ownership, general management as well the responsibility for the funding, but transfers some activities to private companies that undertake specific functions.

A contract states the conditions, the cost, the expected output etc.

Reduction of cost and increase of efficiency are the most common motivations.

The impact on the organizations is of course particularly strong when the concerned functions are close to the core functions of the institutions.

Contracting out concerns a variety of functions such as:

- 1/ documentation
- 2/ preservation and maintenance of the buildings
- 3/ interpretation and display of collections including service to visitors such as educational and outreach activities as well marketing and communication
- 4/ activities of commercial exploitation (catering and bookshops as well the management of the whole process including the management of copyrights)
- 5/ auditing or other functions related to administrative tasks
- 6/ staff training

What the research shows and can be considered an innovative element is that networks of local / regional heritage institutions are increasingly planning and setting up independent organizations whose aim is to provide some of the services usually contracted out by single institutions.

But what makes this really innovative is that those organizations increasingly provides services on a basis of guidelines and standards agreed among the members of the network, and also with the provincial or regional authorities responsible for policies in the field of heritage.

This kind of agreements refer also not only to the standards for the safeguard and management of the collections and sites but also to standards related to display, educational activities and the other services to visitors.

There are some very interesting examples among the case studies:

The **Società Cooperativa Sistema Museale**, a private company whose setting up was promoted by the Region Umbria, that is now a fully independent organization that provides services to a network of 35 museums in Umbria

**Heritage Ireland**, a private company, that manages the marketing and communication activities for the benefit of heritage institutions and centres.

**MUSIS**, an austrian project involving a large number of Styrian museums with the aim of providing services in the fields of marketing, administration, training and more.

A different model - a problematic one - is provided by the French experience of the **Reunion des Museaux Nationaux** that has been operating in the last 10 years as an independent for profit company with a public status for the benefit of around 30 museums, including the Louvre and Versailles. It does not seem to have fulfilled neither the economic objectives nor the institutional goals related to its public service mission such as financing acquisitions. The difficulty to fulfill the institutional goals was pinpointed by a French colleague as “a symptom of the limits and contradictions resulting from relaxing regulations with the sole aim of restricting public funding”.

The “ultimate” and drastic form of outsourcing is the transfer of the overall responsibility for the management of museums, monuments and sites from public authorities to private entities, sometimes companies, sometimes foundations or associations.

Usually the public authorities keep the scientific and technical supervision as well the financial responsibility for maintenance, while the range of responsibilities, functions and activities vary according to the nature and the goals as well to the context.

This approach seems to become more and more popular also in European countries with a long and outstanding tradition of managing heritage. Even in France the responsibility of managing some of the most important and apparently profitable monuments and sites has been transferred

to private partners. The list includes Baux en Provence, the Popes' Palace in Avignone, the Blois Castle and others .

The reader includes some cases, that shows clear evidence that the transfer of management to private companies can have a very positive impact in terms of financial outcomes, providing also a new source of additional funding for the long term goal of preserving the monument for the benefit of future generations.

It is this the case of **Schonbrunn Castle** where the fulfillment of the economic targets within a very limited number of years has been accompanied by relevant achievements in terms of improvement of the overall management capacity and in terms of successful setting up of partnership at territorial as well, as at national and international level.

### **The transformation of public institutions into independent organizations**

A further step in the process of changing the management of heritage institution concerns not only the management but also the governance issue.

It is the case of the **Zeppelin-Museum, the Sheffield Galleries and Museums Trust and the Leonardo da Vinci Museum.**

The solutions adopted in the abovementioned case seem to have adopted a similar approach, that is the establishment of new independent organizations based on private-public partnership.

The different conditions and context produced different juridical forms (a limited liability company in the first case, a charitable trust status for the Italian and the English institutions) but the common pattern to this experience seem to be related to the capacity of turning the issue of managing a heritage institution from a problem and a responsibility only for the public authorities to a problem and a responsibility to be shared with the local communities and the different social and economic target groups.

This element seems not by chance the same crucial factor for the success of the so called privatisation of Dutch museums, that was in reality a major redesign of the institutional framework in order to enlarge part at least of the responsibility for managing those institutions to the Dutch citizens.

### **The key factors of success**

Notwithstanding the enormous differences in terms of context (political, legal, fiscal, economic, cultural etc) and at this very early stage of the research, it seems possible to identify some patterns common to the best practice experiences:

**A/** A clear definition of the identity, the mission, the mandate, the goals concerning the institution as the prerequisite for planning a new institutional framework effective and tailored to the specific needs.

**B/** A congruity between motivations, goals, means, tools and expected outputs in qualitative and quantitative terms.

(eg if the motivations and the goals are primarily economic and related to the budget of the institutions such as the increase of self generated income the most effective solution could be some carefully planned outsourcing, without redefining the institutional framework).

**C/** A process oriented and flexible approach.

It seems that successful experiences are based on an ongoing process, where most attention is given to planning step by step in every aspect, with openness to change.

First investigate the actual conditions within which to set up the new framework, then identify requisites, check feasibility, then test on a small scale project and so on.

**D/** A full understanding and acceptance on the part of private partners of the specific nature and function of heritage institutions.

## **Questions for the debate in the workshop (as well as possible directions for future research)**

What are the key factors for successful redefinition of management of heritage institutions and how they interact (eg: dimension, location, themes, degree of autonomy from public authorities, personal background and skills of managers involved, local business communities' attitudes, economic context etc)

Is the commercial profitability of heritage institutions an illusion but for a few monuments or museums that are or include popular attractions?

Is there any kind of negative impact on public funding (eg on long term financing or on new project) deriving from a major involvement of private partners?

Do also local small and medium size heritage institutions have a chance to involve the business community and other private partners in the funding and management of local heritage? And how?

What are the main areas of contrast with private partners when they are involved in the general management of heritage institutions?

Is there any core responsibility or function that is advisable or imperative to keep out of the influence and control of managerial culture ?

Does the involvement of private partners and their managerial culture in the general management of an heritage institution have a direct impact in the organizational model ? eg Does it usually mean to introduce an approach based on matrix organizations or task forces instead of the traditional hierarchical pyramidal structure?

Is it the two fold management model (clear division of responsibilities between the scientific research, the preservation etc and the management & administration) based on the recognition of different objectives under a common framework with an ongoing negotiation the most effective model?

The managerial culture can provide cost effective solutions to specific problems of heritage institutions and bring in a new approach to many issues. Does the managerial culture contribute also to the general development of culture?

What are the core competences and skills that heritage institutions need in order to face the new challenges? Is there a need of new professional profiles? Do heritage institutions need to bring in managers from the business sector and adapt their skills to the specific context or is it better to employ heritage experts and retrain them?

# Policies towards the Public

Judi Caton

This paper looks primarily at museums and museum audiences for that is my field. But many other cultural institutions from castles to theatres are operating within the same environment and are equally involved in making new relationships with their audiences.

The paper will address three areas;

- Recent changes in Policy
- Academic framework
- Socio-economic issues

and will end with a note about a common European approach to policies towards the public.

## Recent Changes in Policy

The role of the museum in society has very obviously moved on from the time when collections were there to instruct and the objects were expected to speak for themselves, labelled only for identification.

Then the visitor was a passive person, who either came as a member of a knowledgeable elite or to benefit from the opportunity of seeing wonderful and strange things.

Even twenty to thirty years ago, though some information was given, museums saw little need to use objects to convey messages, and even less need to involve the visitor.

Today, by contrast and in many parts of Europe, museums are actively seeking to enable their audiences to interact with the collections, to learn from and enjoy them as they wish.

This change, found in all our case studies, is part of a revolution: a revolution that has occurred in policy towards the public. Quite simply many museums are less object driven and more people driven.

### More people driven, less object driven

The revolution means in practice that every aspect of the institution's work is opened up to involve audiences, and it is useful to look at this here under 4 broad headings.

- *active audiences*

The people who use the museum are no longer passive visitors, but take an active part in the development of the museum's programme through consultation, through continuous dialogue.

- *segmented audiences*

Cultural institutions no longer refer to 'the visitor' but to appropriate target audiences, to audience segments for whom appropriate communication techniques must be chosen.

- *new interpretation techniques*

Collections are interpreted for specific audience segments not for the peer group of the curators or the scientists. The collections are interpreted using multi-media and multi-sensory techniques to enable audiences to experience them, and to stimulate their curiosity through all the senses, not just vision.

- *staff for working with audiences*

Specialist professional people are now working in museums as interpreters, and audience advocates in the ongoing dialogue with the public.

## The Academic Framework

The revolution has not happened by chance. It is accompanied by much academic debate and published theory, and it is instructive to our workshop to see how academic debate and research,

much of it external, has been imported into the cultural sector in the area of policy towards the public.

The academic discussions and published theory have been concentrated in the fields of Visitor Studies, Education Theory and Marketing Theory and Practice.

### **Visitor Studies**

The discipline is at least 100 years old but has recently gained ground and respect in the cultural professions, as it provides an arena for the discussion of methods and approaches to visitor survey and programme evaluation. In doing so it affects the way museums and cultural bodies develop and run their programmes.

### **Education theory**

Education Theory has also had important influences. One of these is that it has enabled cultural institutions, previously only interested in cognitive gains (the acquisition of knowledge and facts) to initiate and value programmes for affective gains (stirring curiosity, stimulating learning from objects).

Education theory has effectively underpinned the move from offering formal education to hands-on experience, part of our revolution.

### **Marketing theory**

Marketing theory and practice has provided many useful tools for understanding and working with audiences. Cultural institutions are now equipped to research and analyse their audiences, to define audience segments, to develop branding and niche marketing, and to refine publicity techniques and targeting. All cultural institutions should now be able to recognise the diversity and complexity of their audiences and to direct programmes towards their very different needs.

### **Socio-economic Issues affecting policy towards the public**

Our revolution in policies towards the public is rooted in academic debate, and it is also running parallel with the socio-economic realities and issues in Europe today. Some of these issues are already having an influence on the cultural sector and their influence is likely to grow in coming years.

### **Identity**

The first issue is that of identity. Cultural bodies must respond to their role in defining, constructing and affirming identity.

There are at least 2 main strands. The first is in the fact that millions of Europeans are not living in their place or country of origin. Europe has an increasingly mobile population, and the cultural institution has a role in providing a sense of place, and an identity not just through a local or regional cultural heritage but also through our huge cultural diversity.

The second strand regards the boundary changes and devolved regional powers across Europe. In Berlin, for example, collections are being brought together to celebrate unified identity, while in Edinburgh a new Museum of Scotland has opened, celebrating a country with a new parliament with devolved powers. As Europe realigns and devolves, so museums have a role to play in defining and celebrating identity.

### **Regeneration**

Closely related to identity is the issue of regeneration, and once again there are local and more regional strands. Cultural institutions at the centre of a community can provide programmes to combat social exclusion among poor populations and in centres of high unemployment.

Combating social exclusion is increasingly seen by politicians as part of the role of all public bodies. They see audience driven programmes as offering cultural empowerment, and with it a greater sense of self-worth

Moreover, learning from collections is increasingly seen as a useful alternative way of learning, as well as way of supporting the curriculum. Museum education is increasingly being adopted to enable people in disadvantaged situations to develop an appreciation of learning.

More traditionally, the cultural institution is at the forefront of city and regional regeneration across Europe. Investment in flagship cultural institutions, such as the Guggenheim Museum in Bilbao, is seen as a way of increasing regeneration and inward development.

### **Cultural tourism**

Closely linked to regeneration is the increasing emphasis of all European countries on cultural tourism. It affects us all, and our cultural institutions are one of the strongest magnets for travellers.

Cultural tourism is already big business and is set to grow, and the new policy towards the public must provide programmes and services for the international traveller, as well as the local and regional audience.

### **Access**

Another hot issue for museums and cultural institutions is for greater access and equality of access. Most European governments are emphasising the need for museums to widen access to their collections, to their buildings and to their programmes.

### **24 Hour lifestyle**

One pressing access issue for all Europeans is the development of a 24hour life-style. As shops and other facilities remain open for longer and longer there is pressure on all other bodies offering a service to the public to become a 24hour zone. New policies towards the public also mean staff in cultural organisations facing new working patterns.

### **Experience (of real things)**

But greater access alone will not be enough. Museums must sharpen up their interpretative programmes so that they offer audiences the chance to experience the collections for themselves, to be active and creative.

### **Information overload**

Cultural institutions will also have to respond to this modern phenomenon. As the amount of information available to us becomes more and more overwhelming, and as we become ever more skilled at skimming, surfing and zapping, museums that are able to provide selective stimulating exhibitions, will succeed.

If 'sound bite' lives are our reality then cultural institutions must respond with appropriate policies towards the public.

### **A Common European Approach**

I should like to comment briefly on a common European approach among museums towards the public.

The workshop 'European Museums beyond the Millennium' organised by the Museums and Galleries Commission in the UK in 1998 found that there was no common approach. I believe that this is not very surprising. Museums and exhibitions and cultural institutions throughout Europe are rooted in cultural diversity, a diversity that we all celebrate. We have seen too that audiences are diverse and the museum experience is moving from formal learning to individual

hands-on experience. There can be no common approach. Policies towards the public must allow for the differences and preferences among our populations.

I hope though that I have shown that there are some common threads in policies that are to be found in the case studies. The revolution that for many parts of Europe has already taken place in more people driven, less object driven museums is an unstoppable movement, mentioned by everyone. Moreover, the socio-economic issues we have in common; of identity, cultural tourism, access, regeneration and the others I have discussed will, I believe, shape policies towards the public throughout Europe. They will all have at least some effect everywhere but their influence will rightly vary from place to place, with some countries and regions focusing more on some and less on others.



# **Policies Towards Staff**

Mark Hilton

I am Mark Hilton, the Finance and Administration Manager of Sheffield Galleries & Museums Trust. The Trust was created to manage the five non-industrial galleries and museums who were formally under the control of Sheffield City Council.

My role as Finance and Administration Manager covers not only financial reporting, but also general administration, including information and communication technology, office equipment, and personnel. It is in this latter role that I have been asked to discuss policies towards staff arising from a re-engineering of a museum operation to day. Policies towards staff are time consuming because you are dealing with individuals who all have a different agenda, hopes and fears.

I have studied the case studies of Carnuntum, Deutsches Museum of Munich and MuSIS, as well as the experience gained at Sheffield to identify what I consider are the main learning points arising from a museum operation being transferred from local or government authority to an independently run organisation. They can be summarised as follows.

- Communication
- Training
- Recruitment and Restructuring
- Team Building/Participation
- Motivation

## **Communication**

It is vital that all staff receive as much information about the process as soon as possible. Without clear straightforward communication an organisation will not win the trust of staff and will risk growing cynicism if changes that arise from a move to independence are not explained clearly to staff.

Communication should preferably be face-to-face in regular verbal briefings, supported by a newsletter providing further information about the process. However these may not allow staff their own input into the process. Although at Sheffield we use both regular verbal briefings and a newsletter, staff do not yet feel comfortable in opening up in a forum where management are seen to talk down to staff. Thus some form of informal functional team briefings are used to allow staff to debate the process, and to ensure it is understood and accepted by all.

In addition each individual member of staff should receive a review of their personal development within the old organisation and the likely changes that will happen within the new organisation via informal briefings with their line manager. Such a review should only be given by managers fully briefed on the changes that are taking place. This will enable a full and open debate about the opportunities that may arise for the individuals involved.

## **Training**

As an organisation moves into independence, there is a need for a review of previous training undertaken by staff, and also to take the opportunity of redefining the job descriptions and the job specifications of staff transferring to the new organisation – a Training Needs Analysis.

Without such an analysis job descriptions will no longer be valid because of different responsibilities being undertaken by individuals in the new organisation. Certainly at Sheffield, and it seems to have been repeated at the other organisations included in the case studies, a new organisation has been developed which has new and sometimes different roles and responsibilities for staff transferred as demands arise to generate income from new sources. New

job descriptions should be cleared with the employee as soon as possible to avoid misunderstanding and to identify training needs.

A revised organisation structure could also lead to new ways of working, particularly new ways of team working. Complete reappraisal of what teams are actually required in the organisation is certainly one of the key features of what has happened in Sheffield. Whereas previously the focus was mainly on individual sites we have now built up an organisation structure such that the focus is towards functional groups of staff (i.e. all the curatorial team working together on one project for the first time).

IT is a key to the success or failure of an organisation. Certainly in Sheffield the opportunity has been taken to invest quite heavily in a new computer network. Such was the lack of investment in the museums and galleries in Sheffield over the past ten years that there was very little IT available for staff to use in their everyday work. However, as well as investing in hardware and software there is also the need to invest in the training required to operate this new technology.

To reinforce new ways of working and to ensure that individuals have what is required to meet the needs of their future role there are a number of sources of training that can be utilised as follows:

- Where particular skills have already been identified as existing within the organisation then internal shadowing of those people can be used effectively.
- It may be possible to arrange vocational exchanges with similar institutions where those other institutions have been identified as having particular centres of excellence for the skills required. In Sheffield we have good strong links with both the Victoria & Albert Museum and the Tate Gallery, and we are looking to not only utilise vocational exchanges but also to utilise the internal courses that those institutions hold regularly.
- In Sheffield we have found that a number of local colleges and universities offer high class training which can be purchased at relatively low cost through the use of European Community Grants.
- In addition there may be local business support organisations that are able to access grants from the European Community.
- Previously accessing such grants would have been difficult within a local government authority organisation. However as an independent limited company accessing such grants is made more straight forward.

### **Recruitment and Restructuring**

There is bound to be change whenever an organisation moves from the control of local authorities to independent control. Preparation for change is vital. A full review of the strengths and weaknesses of the organisation should be performed before control is passed. At Sheffield this was also a time consuming area for incoming management when they took over.

This change will inevitably lead to some members of staff feeling disenfranchised and others finding that their role in the future becomes redundant or significantly revised. Any such change should be handled sympathetically and as much preparation and communication as possible with the staff involved to ensure a smooth progress free from any legal implications.

New skills will be required by the organisation. It is important to meet the requirements of any equal opportunities policies. Advertisements should be published both internally and externally. This enables existing staff to again participate in the process.

Whole new departments, such as marketing, will probably be created. New people joining the organisation from outside bring with them problems as well as new skills. Existing staff may not quite fully understand how they are to relate to new staff. Preparation in advance of the arrival of new staff is vital to ensure as smooth an introduction as possible. Existing staff may feel vulnerable at a time of such great change.

Under an independent organisation there may be more scope to facilitate the use of part-time staff rather than full-time staff. As a result the organisation can be more flexible in the way that it provides services to the public. As demonstrated by Deutsches Museums of Munich the use of volunteers, not allowed under the previous organisation, is a way of providing service to the public when finance is tight. However volunteers need training as well!

There are problems associated with recruiting to museums in the independent sector. Certainly local government terms and conditions are seen as more favourable than those in the independent museum sector. In addition staff with appropriate skills in the museum world are hard to come by and there is great competition in local markets to recruit those people. This inevitably will have an impact on the salary structure within the new organisation if the right person is to be recruited, although the flexibility of an independent organisation to ignore past salary scale constraints is available.

### **Team Building and Participation**

A new organisation has an opportunity to introduce new ways of working through setting up project teams. This provides a flexible way of meeting the day-to-day needs of an organisation. Staff in Sheffield were very much site based and have actively been encouraged to be more flexible and to work at other sites. This allows staff to work with different collections and potentially with different audiences, adding to their skill base.

Wherever possible we have sought to use teams from across different disciplines. Again it allows staff to identify common bonds as well as to utilise each others skills more efficiently.

Staff are keen to participate in any new organisation. For this reason Sheffield set up a Consultative Forum to enable staff to have their own say in the way that the organisation is run. Staff representatives from all parts of the Trust are able to meet on a regular basis to discuss key issues facing the Trust.

It is very important that a new organisation builds its own new external partnerships as soon as possible. Certainly in Sheffield under previous local authority budgetary control very little networking took place. The Trust has encouraged curatorial staff to travel throughout the UK to make partnerships with other museum organisations.

### **Motivation**

Motivating staff is an issue that needs to be managed on an on-going basis. Although a new organisation offers fresh challenges and new horizons, it is unlikely that any further monetary remuneration will be available.

Staff will need to be motivated more by their jobs than from what the organisation can pay them. This could include the ability to build a personal reputation for themselves in what is seen as a modern innovative museum organisation. Ensuring they have the ability to network across both local, national and international boundaries is a way of motivating staff. Ensuring staff are able to enhance their skills and enjoy the use of modern working practices is a way that staff can be motivated to provide a high quality of service.

### **Summary**

In summary policies towards staff is vital. There must be a significant amount of preparation performed on reviewing the organisation structure before re-engineering takes place. Staff require in-depth communication throughout the process. There can never be too little communication. In Sheffield the one big problem that we face is that staff say there still is not enough communication between management and themselves.

There must be a recognition that new skills will be required and quickly if a new organisation is to survive independently. However it is important to retain as many of the old skills within the previous organisation as possible and reduce the risk of alienating staff.

A transfer from local government to an independent private company will be viewed with fear by the staff. It will be an unsettling period for all staff. When change is introduced there will inevitably be some losers as well as some who win. This process must be managed as sympathetically as possible. To overcome these fears it is necessary to provide as many positive opportunities for all staff as soon as possible and ensure that staff feel involved throughout the process.

## **Reports from workshops**

# Interaction, Co-operation, Partnership

Danielle Cliche

## About co-operation and partnership

Co-operation is a well-known, long practised concept among scientists and cultural managers in Europe. Networking among partners in different arts, culture, media or heritage sectors, has led to the creation of new ideas, products and pooling of limited resources. Co-operation is built on mutual trust as well as risk and comes in all shapes, sizes and varying degrees of successes. The latter implying that there is room for improvement and greater awareness of the advantages and disadvantages of different types of co-operation or partnerships developing throughout Europe today. Promoting co-operation between the culture and heritage sectors as independent fields, for example, is one challenge that has been largely left unanswered.

Through the case studies collected in the MIMEH project, we were able to identify several categories of co-operation underway in the field of cultural heritage. These include:

- **European co-operation** organised formally through projects sponsored by the EU (former DG X Raphael programme) or informally via networks such as the Residences Royales en Europe (Schönbrunn Castle is a member)
- **Vertical co-operation** among inter-governmental, national, regional and/or local partners such as the International Cultural Project, Ars Aevi or the Zeppelin-Museum Friedrichshafen GmbH.
- **Horizontal co-operation** among cultural institutions in one sector such as the Sistema Museale Umbro (Regional Museum Network).
- **Inter-sectoral co-operation** with eg. vocational institutions but also with services such as transportation or tourism on the one hand (such as Heritage Island in Ireland) and between different cultural institutions such as music or theatre on the other (such as the Deutsches Museum München).
- **Mixed public-private partnerships** (such as the Castello di Rivoli. Museo d'Arte Contemporanea, Turin).
- co-operation between the **museums with the public as its audience** (such as The Ragged School Museum, London or the Deutsches Museum München)

Participants of workshop 1 elaborated on their experiences with these various forms of co-operation and stressed the importance of direct and indirect co-operation between the museums themselves including an exchange of good practices, material and staff sharing, co-operation in the field of basic management, human resources, joint ventures in personal training or collection policies as well as the creation of a pool of freelance workers or experts for museums.

Raymund Kastler, in his introductory paper, set out a step by step approach to co-operation. He underlined the need environmental monitoring to understand the different legislative, administrative, socio-economic, political and cultural contexts in which co-operation can (or in some cases not) take place. Clearly, the use of new technologies is changing the parameters for co-operation as well as socio-political changes such as globalisation, liberalisation, policy questions of territory, identity, social exclusion, equal opportunities, ageing populations and access of the public. These all frame the conditions for a new emphasis on partnership, co-operation and interaction throughout Europe including many "out reach" styled programmes or new strategies towards civil society (eg. via new approaches to volunteer work).

The main bulk of the discussions in workshop 1 focussed on specific aspects of co-operation in the museums sector including:

- Cultural institutions, networking and new partnerships
- Museums networking as a marketing tool or vice versa?
- Co-operation with civil society via volunteer work

### **Cultural Institutions, Networking and New Partnerships**

It is taken for granted in today's "networked" society that everyone is collaborating in one form or another through museums collections, special exhibitions or staff exchanges . Above, we identified several types of partnership arrangements which were illustrated by the MIMEH case studies. Are these "innovative" cases isolated examples? Can networking be considered a fundamental activity of cultural institutions today? Should it be? What is an alternative for museums which find themselves in saturated markets such as in the case of the Deutsche Museum in Munich where it has been determined that networking will not help them achieve their goal of distinction and increased visitor attendance?

Whether it is internal, external or social networking (defined as co-operation between profit and non-profit organisations), participants of workshop 1 agreed that networking is and should become an important element of any museum policy or management strategy. It was acknowledged, however, that the term networking can be somewhat elusive and requires clear parameters defined by the individual institution according to its own needs which could range from financial to garnering exposure abroad via regional co-operation<sup>3</sup>. Larger questions about whether networking is a consortium of partners with "real goals" or a loosely formed process of exchange were posed. Can it begin on a level of information exchange or does it need to be formalised through official agreements?

Cultural policy priorities can influence the degree to which and the type of networking or co-operation between museums. While large-scale cultural institutions continue to receive the bulk of state cultural budgets, real public funding is diminishing. Some institutions have made a 180 degree turn toward the private sector to fill their coffers. Others have taken the "90 degree turn risk" with mixed public and private funding strategies. This latter form of co-operation has been labelled "external networking". For our purposes, it was defined as a group of museums working together with other public or private services as part of an overall management strategy. Examples were presented of museums working together with independent theatre or music groups by providing concert space in the museum itself. Cartan Finegan of Heritage Island Ireland explained the successful co-operation they experienced with tourism agencies, transport groups and services, businesses, community centres, shipping companies etc. The risk involved in the latter form of co-operation, it was noted, is the reconciliation of potentially conflicting missions and objectives of partners strictly oriented toward the marketplace or the public good.

### **Museums networking as a marketing tool or vice versa?**

Scratching beneath the surface of our discussion on the different types of networking brought us closer to the real motives underpinning the impetus to incorporate networking as an important aspect of museum policies or management strategies. Museum representatives around the table shared with us some of the main objectives and goals behind their (formal and informal) networking strategies including:

- to attract additional funding by communicating or collaborating on a regular basis with potential sponsors and donors;
- to bring in more visitors or cultural tourists through interaction or formal partnerships with tour operators and other tourism related services;
- to secure themselves as an important social actor in the community and its economy through partnerships with other major community actors;
- to compete against other attractions and leisure time activities;

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<sup>3</sup> Such co-operation was illustrated by Andrei Zonin, Institute for Cultural Programmes, St. Petersburg who spoke about the benefits of Petersburg museums collaborating officially with those in Helsinki, Tallin and Stockholm under the aegis of a regional networking banner.

- to build systems of collaboration that would help to redistribute scarce resources (referring mostly to human and physical resources rather than financial).

In other words, museums networking, in whatever form it comes, could be construed as a marketing tool and vice versa.

Once the term marketing raised its head into our discussion, there was no turning back. Clearly, there is a strong will and need for museums to engage in marketing activities as they search for private sponsors to fill the funding gap where public sector money used to be. In some cases, such as the Zeppelin museum in Friedrichshafen, management has gone beyond the ABC's of museums marketing (in-house services such as book shops or restaurants, events marketing or visitor card strategies<sup>4</sup>) to the development of their own product line. While one concept of marketing is not applicable across the entire museum landscape, participants complained that if the strategies themselves were not generally handled by a marketing specialist with heritage knowledge or if the marketing concept itself was not culture-oriented or multidimensional, the strategies would not succeed as has been shown in cases where the development of marketing strategies, for instance, are given to curators or graduate students with little or no marketing knowledge. They expressed the need to define the relationship between the two worlds of marketing and culture and gave the example of the Wohl & Sein – Being and Wellbeing museums project in Basel.

When the various dimensions of a heritage oriented marketing strategy are spelled out, one of the first conflicts to be addressed at the beginning is over what should be marketed, for example, scientific information, fast tracked specialised tours for target groups or perhaps combined cultural tourism packages. Multidimensional strategies could, for example, be created from the point of view of both the museum and the tourists. Education of tour operators by museum staff was considered a high priority. There was, however, an agreement in the group that while marketing can provide strength to both small (in particular) and larger museums that the long line ups- at the most popular museums will never change and the gap between rich and poor museums is widening. Collective marketing strategies among different attractions within a city or region (including competitions, festivals, museums) was recommended as a potential solution.

Before concluding the discussions on museums marketing, some warning signals were issued. As mentioned above, museums are an important social actor of the community and the economy of that community. Museum managers, therefore, have a responsibility to protect the integrity of the museum and its collection and keep quality as a high priority in the development of its policies and programmes. The public sector, at the same time, also has a public responsibility for culture and its institutions, including museums. The cultural value of museum activities and its collections, should, therefore, be at the heart of any marketing or other strategy and care needs to be taken not to relegate it to marketplace forces or rush tourism tendencies to get as many visitors in and out of the museum as possible.

### **Volunteers – a changing resource**

The final debate examined co-operation between museums and civil society, namely volunteers. While a wide and broad field of investigation, with varying approaches in the US, UK and the rest of Europe, questions regarding the identity, needs and contribution of volunteers is becoming more and more important as society ages and runs out of work. One of the first steps to be taken is an official recognition of full and part time volunteer work, especially important in the case of women who make up the majority of volunteer workers.

Recent studies have shown that the number of volunteers is on the rise and the nature of volunteerism has changed dramatically. There is a new demand today on the part of individuals

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<sup>4</sup> A recent study conducted by NOMISMA in Bologna revealed that visitor card strategies were helpful for smaller museums and that they did not effect the attendance rate of visitors to larger museums.



to become volunteers as they are highly motivated to involve themselves as social community actors. In fact, there are some cases where people are doing (and more interested in) unpaid than paid work. The Deutsche Museum Munich, for example, has recognised that while they once had to "re-skill" their volunteers coming from the industrial sector never expecting to work in a museum, they are now faced with a work force of highly intelligent and skilled volunteers who are in the prime of their life. Clearly, the mythology of volunteers as "birds unable to scratch the backs of crocodiles" has become redundant and a new challenge for museum managers to try and find ways of successfully integrating them into the overall staff structure. Three main recommendations were made in this direction:

- Internal public relations strategies are required to integrate volunteers into the staff structure and programme of activities. The media can be a helpful tool;
- Officially recognising the work of volunteers by giving them responsibility for managing a project – allowing them to participate in all stages of the project from the beginning to the end and ensuring that their result is placed on public display (thus offering volunteers something they can not buy) and;
- Create bottom up strategies involving volunteers in the museum according to their own life experiences or by developing apprenticeship programmes offering professional experience to young people (warning: this puts responsibility on the shoulders of already strained staff – solution: hire former students).

# Institutional Engineering

Christopher Gordon

An excellent introductory note (by Ugo Bacchella) had been provided for the Workshop. This sets out clearly how some of the original definitions and aims had been modified in the light of circumstances, and from examining examples of organisational development in the field. The scope of the project had been widened since the 1977 Amsterdam 'Privatisation of Culture' conference to reflect this, and it was also felt to be significant that, in many cases, there had been little actual change in terms of *ownership* or *governance*. Nevertheless, the research had demonstrated that the simple act of contracting out certain standard services could have a rather powerful impact on any given institution as a whole.

The case studies which were most relevant to this topic were drawn from Austria, Germany, Italy and the UK, as follows:

Schloss Schonbrunn, Vienna

Deutsches Museum, Munich

Zeppelin Museum, Friedrichshafen

Castello di Rivoli, Museo d'Arte Contemporanea, Turin

Museo Nazionale della Scienza e della Tecnica Leonardo da Vinci, Milan

Sheffield Galleries and Museums Trust.

The Workshop had found it impossible to give equal attention to all the above, not least as a number of the key individuals concerned had switched to other Workshops. Consequently, the focus of discussion was on the UK and Italian examples. Organisational models were indeed in the process of redefinition as they developed. However, it seemed to be true that legal ownership was largely unaffected. Contracting out (or 'outsourcing') did in certain circumstances affect the core operation, but if the main objective of the changes was to improve access to a wider range of financial support, then it did not follow that fundamental structural changes were necessary. To take two examples: the new Sheffield Trust's had been driven by financial and political necessity for reasons of long term survival, whereas the Milan example had instituted major change to assist expansion and changes in the way the collections were disposed and displayed. All the examples seemed to encompass three main classes of motivation, often combined as follows:

- (1) requirement to expand the secure financial base;
- (2) management and personnel reforms (especially concerning quality of staff, and flexibility of practice);
- (3) pursuing niche markets, and developing much stronger local and community contact.

The research as a whole tended to show that growth in the number of independent entities had mostly been beneficial in the provision of opportunity for grouped services (outsourcing) to agreed guidelines and minimum standards of service. It was also noted that there were examples (e.g. in Italy's Umbria region, and under the UK's Museums and Galleries Commission 'Registration Scheme') where additional public finance was directly dependent upon collection and display quality thresholds. However, in most cases, the effects of organisational development or institutional engineering on actual museum/gallery collections was only marginal.

In the case of the Sheffield Trust, the key factors were a devastating reduction in available civic financing, coupled with de-industrialisation of the whole region (coal and steel based economy) which meant that commercial sponsorship was not a viable alternative. The fortuitous arrival of the Arts Council's (ACE) Lottery-funded 'Stabilisation Scheme' had allowed for negotiation of a ten-year package deal between the local authority and the ACE and Sheffield City Council, subject to the establishment of an independent Trust. The incentives were built into the 'deal'

and also included qualitative measures. It was extremely unusual for a local authority to commit a basic level of agreed financing over such a long period ahead. The performance of the Trust was being monitored extremely closely by the local authority – which still retained ultimate ownership of the collections and buildings, and would inherit the problem back if the Trust failed. The Stabilisation agreement required the negative financial situation to be reversed, or at least at break-even point after 6 years. The museums' staff (five institutions were involved, with another five industrial museums in a separate trust arrangement) were adamant that there should be no 'dumbing down'. Their assessment was that many of the original intractable problems stemmed from inflexible local government systems, and from the museums' general failure to market themselves dynamically, both locally and further afield.

Reference was made to the highly centralised French model in relation to museum merchandising, not felt to have been entirely successful. There was felt to be a fundamental difference in systems in large nation states and smaller countries, although traditions and practice varied enormously. Sponsorship had been an important factor in Italy, but the success of initiatives relied very largely upon the efforts and contacts of key individuals. Only the Region of Lombardy had made any serious attempt to formalise a more systemic public-private partnership culture in relation to museums and the arts.

Discussion then explored other economically-driven models. Given that parts of the cultural industries successfully followed industrial models – growth, profit, acquisition – was there a parallel which the Milan example partially showed might be successful, if applied to museums and collections? This was inconclusive, although it was generally accepted that competition between institutions and notions of increased productivity were relevant and helpful (cf. the Tate Gallery, and the recent initiative of the Leningrad Hermitage in London). Nevertheless, the general feeling was that the *product* itself (the collections) was of a different order to a commercial one, in that it was more about experience than commodity. It was noted that in the case of film, there was a lively mixed economy with considerable crossover between the commercial and the subsidised. It was noted that fairly recent Swiss research demonstrated that fiscal incentives only made an extremely marginal impact on culture in general. However, it was felt that certain sectors had made significant input directly – e.g. the reformed banking system in Italy and Spain, the recently created National Lottery in the UK etc.

By general agreement the key factor for cultural institutions going through organisational development was to retain (or create) the maximum degree of flexibility in planning, and to retain the positive involvement of staff members. Imposed, or 'top down' solutions might well risk turning out to be neat looking packages with nothing inside. Where networks of museums had been created to provide specific services on economies of scale (e.g. for staff training purposes) the outputs were on the whole disappointing, nor had they led to a significant amount of radical change or innovation. Interesting innovative practice had tended to come from the examples provided by smaller institutions where there was less of an assumption about financial security because of size or institutional inviolability. An interesting 'lateral' management example was the London International Festival of Theatre (LIFT) partnership with Shell UK, which had seen a rather new and very productive exchange of benefits both ways, as against traditional sponsorship expectations.

In summary there was agreement on four major areas which identified key factors for success over any period of restructuring:

- (1) Clarity in defining objectives, backed up by good strategy and planning;
- (2) Correspondence between the objectives and the means/resources to achieve them (personnel, qualitative and quantitative measures);
- (3) Flexibility, with planning and management regimes as open as possible;
- (4) Private partners engaged, but fully accepting the specific nature and function of the institution(s).

# **Policies towards the Public**

Lidia Varbanova

## **Why do museums need policies towards the public?**

The workshop participants agreed that the need for innovative policies towards the public in a museum is provoked because of:

- cutting of government budgets at a national and regional level;
- transforming the museums into open public spaces;
- making better dialogue with the outside environment;
- changing in the needs and expectations of the audiences;
- new competitors who strive for the money and the free time of the consumers today;
- the new era of linking communication and technologies with arts and culture.

## **Policies towards the visitors**

In her introductory speech Judi Caton said that “the policy of museums in society nowadays has very obviously moved to less object-driven but more people-driven”. The new museology is very much linked with public. The audiences today are not just passive visitors but active participants. In our workshop we agreed that it is important for a museum to know and understand the profile, the needs, expectations, the level of satisfaction of its visitors by marketing researches. There are lots of examples in the seminar reader about important target groups for a museum - children, youth, elderly people, museum specialists, tourists. A special department called “Programs” is established in the Deutsches Museum München to meet the diversification of museum public.

The participants in the working group agreed that it is of utmost importance to have high quality services and products for the museum visitors. In some cases the problem is not only the decrease in the museum visitors, but the overcrowd and too much attendance which could be dangerous for the historic sites.

## **Policies towards the residents and the museum specialists**

During the discussion we found out that these two groups which are indirect “clients” of a museum, have completely different needs and expectations concerning the marketing policy and programming. The visitors in many cases look for excitement and adventure, they wish to “feel” the ruins, to touch the objects in the museum. Archeologists are striving towards conservation and preservation of the exhibited objects. There are cases when the residents are sometime against the archeological digging because it affects their properties, lands and houses.

The role of the marketing manager is very difficult as an intermediate between these three groups in terms of reaching negotiation and agreements, solving conflicts and misunderstandings.

## **Policies towards the funding institutions**

This topic was discussed during the workshop in the framework of marketing strategies and techniques. We reached the point that museums need to link marketing with fundraising, to bring more long-term sponsors, to organize special events and charity campaign and to attract individual donors; to develop further various membership schemes and to build up new friends and supporters.

A good formula for the financial management of a museum is to find out a reasonable balance for the mixture of funds coming from the government, local authorities, sponsors, foundations and self-generated incomes.

### **Policies towards other groups**

Important target groups for the museums today are also politicians, opinion leaders, journalists, associations, networks, clubs, volunteers, stakeholders. The government is responsible for the museum policies towards the public in most of the European countries and therefore museums depend on the overall national cultural policy. Government should set up a helpful legislation to facilitate mixture of funding in the museums which will support “the good formula” for bringing together the cultural heritage and the audiences. Government has to take care for the best conservation and preservation of the museum objects and archeological sites. Therefore it is important for the museum managers to target and to communicate with government officials.

### **Communication policies**

The workshop participants shared various methods of communication in the museum practice - public relations, advertising, direct marketing, promotion techniques. They agreed that journalists play a key role in this process. The discussion was around two main questions - how to attract them and how to build up long term relations. It is important to find out the right media for promotion of a concrete project with the purpose to reach a specific target group.

Dennis Rich shared the US experience in direct mailing, receiving efficient feedback from the audiences, building up museum friends and supporters, unusual forms of advertising.

Petra Bohuslav explained the positive practice of the Archeological Park Carnutum in Austria where children encourage their parents and friends to visit the museum, excited by the interactive educational programs, provided by the museum. This is a very good example of a “life advertizing”.

The workshop participants stressed the importance of using Internet and the new technologies in the museum marketing. There are lots of examples in the seminar reader on this topic. The important question raised was: Will they change the museum into a virtual reality soon? Will they bring new audiences?

### **Cultural tourism**

A good example for linking policies towards the public with cultural tourism is the Ireland Heritage Marketing Group, which provides a Touring Guide aimed at individual travellers, an Explorer Card for special offers and discounted admission, the bi-monthly HI newsletter mailed to tour operators and tourists board officers. The balance between tourists and citizens of the region is important for the museum to build up its own audiences.

### **Open questions for further researches:**

Several important questions for further discussion were formulated as a result of the workshop:

- What is the decision-making process in the museums concerning the balance between programming and audiences/
- How to use innovative marketing tools for our “internal clients” - the staff, the Board, the museum curators?
- What is the new profile and functions of the marketing and PR manager of a museum? How to increase the professional recognition of these specialists?
- How to set up a successful innovative pricing policy?
- How to make the museum space interactive, warm, welcoming, sociable, friendly, surprising?
- How to take better care of the audiences?
- What are the community responsibilities of a museum? How to increase the access and distribution of the museum services outside the buildings?
- How to link the policies towards the public with the organizational culture of a museum?

- How can we use these successful innovative management models in other museums around Europe?

Museums today are not just buildings and objects, but a bridge between people - a special “meeting space” between people from the past, present and future.

# Round Table: How can training institutions meet the news trends and challenges?

Isabelle Schwarz

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## Introduction

Following the presentation and discussion of innovative models of heritage management with respect to Interaction, Co-operation Partnership, Institutional Engineering and Policies Towards the Public, this part of the seminar programme focused on training needs and new professional profiles within artistic and cultural heritage management.

The first objective of the Round Table was to identify the gap between the actual training provision in cultural heritage management and the need for new competencies and skills in the sector. Moreover, the Round Table aimed at making concrete proposals and recommendations for training institutions on ways to better meet the challenges and needs in heritage management and to deliver appropriate training and learning opportunities.

Europe's heritage administrators and managers have to face a set of challenges (e.g. process of liberalisation, internationalisation, new forms of partnerships, external and internal pressures, etc.) that require not only financial and managerial skills but creative and visionary thinking. The question of innovation and experimentation is key to the success and sustainable development of heritage institutions.

## Contributions

*Herwig Pöschl:* One of the most difficult, as well as interesting issues related to training within the arts, culture and heritage today, is how to train students and professionals to become **Managers of Change**.

As long as museum and heritage sites are managed by individuals with little knowledge of recent developments as regards policies, techniques and tools in heritage management, those institutions will be unable to adapt to the new context in which they are evolving and to define sound development strategies. Also, the change of management of institutions will only be successful if those changes result from concrete constraints or pressures, be they internal or external.

Today's cultural managers have to acquire very diversified competencies and skills in order to fulfil their role as "Manager of Change". Among the list of priority areas to cover are fundraising, public relations, promotion, marketing. Their job description is a combination of capacities such as:

- Comprehension of the heritage/cultural institution as a system
- Social competencies
- Leadership skills
- Management of processes of change
- Management methods and tools

The question is whether the training of the "Managers of Change" is the role of universities or training institutions that provide very specialised courses throughout Europe. Another item of discussion concerns the approach to adopt with respect to training needs. Should the preliminary analysis within a heritage institution focus on its function (development of services, e.g. new

information services notably with the support of new technologies, merchandising, security, etc.) or on the particular training needs of its staff (analysis of the newness of the needs)?

*Benedetto Benedetti:* Its cultural heritage and prosperity obsess Italy. This richness can either constitute an extraordinary drive to development if Italy succeeds to use it for supporting change or impede progress and forward-looking.

We witness today in Italy serious gaps in the field of heritage management combined with the reluctance to change. While the country is strong in some areas related to heritage (e.g. preservation, conservation and protection), it also has great weaknesses in others, such as marketing and audience development. The notion of enhanced access to cultural and heritage institutions, as well as of improved and more diversified services, are not considered as priority areas of development.

The Scuola Normale in Pisa provides master courses, specialised programmes, continuing education and learning possibilities, as well as "refreshing" courses.

The key characteristics of the training are the following:

- Most of these courses are addressed to graduates that have a general education in fields such as art history, archaeology, etc.
- Besides very few specialised courses, the training is not suitable for finance and business people, engineers, managers or IT experts.
- The training adopts an inclusive approach ranging from conservation to communication and management. It aims to create a common basis of intervention.
- The subject of the intervention is cultural, e.g. an art work, a heritage piece. The training aims to raise awareness about the relationship between the heritage site/piece and the cultural identity of the local community.
- The courses include an analysis of the historical image of evolution.
- The chosen approach is object driven. Therefore, the training associates communication experts that discuss objects as part of a product system. How to present the image of an art work? How to enhance the identity of a heritage piece or site?
- Essential to the success of the training is the link to research, notably applied research, and development.
- The different levels of training are nourished with concrete case studies and systematically involve practitioners in the training delivery. Best practices at macro-level are discussed.

*Andrei Zonin:* While some countries have put much effort in the provision of heritage and/or cultural management training, others are suffering from a great lack of training and learning opportunities. It is of paramount importance to map out the sector and to identify its specific needs, as well as the needs of those actively involved in heritage management. Equally important is the analysis of the context (e.g. in Russia everything related to heritage management training is now very innovative).

In 1997, St. Petersburg launched its very first Strategic Plan of Development in which culture is given a high priority. This led to the duplication of the city's cultural budget in 1998. St. Petersburg's "Investment Strategy" (i.e. World Bank project concerning the rehabilitation of its historic centre) stresses the contribution of heritage, culture and tourism to local development. However, the added value of including the arts and culture in the Strategic Plan still needs to be better affirmed. Moreover, the obsessive exploitation of the city's history and cultural heritage encompasses the danger to promote images of the past. These images have to be carefully rethought and the stress put on the city's future.

Another danger is the adoption of Western models in the field of heritage/cultural management training without knowledge of the context in which they are applied. There is no universally efficient model but only the design of innovative and tailor-made training modules are pertinent.



Also, the "parachute delivery" of training involving foreign experts with little or no knowledge of the environment is a dangerous reality.

Today, there are many new training initiatives in the Baltic Region, i. e. "Arts management towards the year 2003", a project linking the cities of St. Petersburg and Helsinki. The 1,5-year project, mostly funded through the European Union Tacis programme, provides training for directors of cultural institutions in the St. Petersburg area. Its success is due to the following reasons:

- The project was carefully prepared and based on the results of a feasibility study.
- The selection of the participants was made on the basis of interviews carried out by a team of international experts.
- The working language of the training course is English considered as a pre-requisite to international cultural co-operation.
- The programme is connected to the business sector including financial management, marketing, communication, international legislation, etc.

Another component of the project is the development of cultural tourism in St. Petersburg, as well as the preparation of the city's 300th anniversary in 2003. In this context, it would be useful to envisage a stronger connection between cultural administrators and representatives of the tourism industry, for example through the realisation of a common training programme for arts managers and managers in the tourism industry.

*Dennis Rich:* In contrary to previous presentations, this exposé introduced a non-European perspective in the discussion of training within the arts, culture and heritage.

The academic principle underpinning the Arts & Media Management Programme at Columbia College is how to manage culture in a climate of change. The objective of the programme is to train students in the management of change and to develop their problem-solving abilities. As change is positive but not for the sake of change, the course focuses on the development of a sound understanding of change. Participants are trained to understand when to facilitate change and when to consolidate?

The programme aims in particular on the development of abilities and skills in terms of a critical understanding of contexts and situations, flexibility, leadership and business sense.

The training delivery covers the following areas of responsibility:

- Specific management skills, including fundraising and marketing. The objective is to develop a "fundraising culture".
- Entrepreneurship, the willingness to take risks based on a good understanding of the climate of challenge and change.
- Technology and computer science (technologically literate students).
- Interaction with practitioners and professional managers through their involvement in the training programme.
- Placements, Internships, Stages aiming at a rapid integration and adaptation to the professional reality.
- Applied research piece and development of case studies as part of the curriculum.
- Attention to innovation and outstanding examples within the field, e.g. yearly award of outstanding entrepreneurial projects that is granted to professionals that manage change in a particular innovative way.

Generally speaking, the aim is to train future managers that are innovative and able to manage innovation.

*Daniele Lupo Jallà:* Italy is undergoing positive changes within its legal system but the concerned arts and heritage sectors are not prepared to face these changes. The result is a kind of

sclerosis where ways of thinking and doing are repeated without taking stock of the contextual changes.

There is a great lack of training in the field, as well as a strong need to bridge the gap between research, education/training and practical field experience. Due to a high degree of specialisation, the barriers between professions hinder their constructive interaction.

However, today's cultural managers require a high degree of flexibility in order to be able to manage their very wide range of responsibilities.

As an example, the job of a museum director covers mainly four domains:

- Management of the collection (curator)
- Administrative and financial management
- Technical management
- Public relations, marketing, relations with the public

However, training in the cultural field in Italy focuses either on leadership or on co-competencies within the other areas mentioned above.

In order to respond to the current needs within the arts and heritage, training modules should be jointly designed and carried out by universities and cultural institutions, and systematically include international placements and apprenticeships.

Obviously, the difficulty is to achieve the right balance between global training provision and very specialised and focused training modules.

#### **Concluding remarks by Herwig Pöschl:**

**Actors of change** should have multiple skills and combine different fields and sciences in order to manage institutions successfully and to appropriately respond to the needs of their audiences.

Training needs to achieve institutional engineering and the change of mentalities and images. The creation of active communities within heritage management calls for new partnerships and the connection to new areas of science.