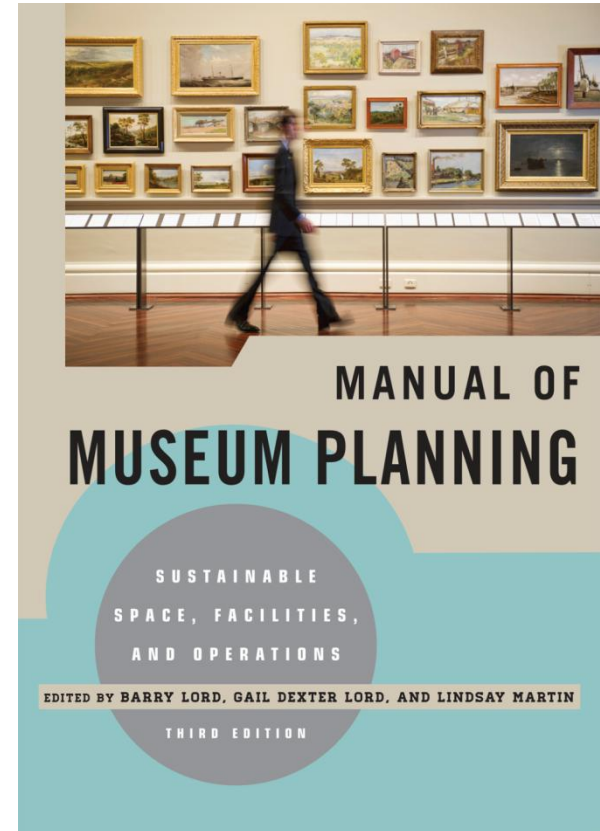


# MANUAL OF MUSEUM PLANNING: SUSTAINABLE SPACE, FACILITIES, AND OPERATIONS

Ontario Museums Association,  
Niagara Falls, October, 2012



The *Manual of Museum Planning* serves as the definitive text for those concerned with the planning, design, construction, renovation, or expansion of a museum or public gallery.

The UNESCO publication, *Museums International*, called the book “a must read for architects, museum professionals and students in either discipline who aspire to the pinnacle project of both professions – building a museum.”

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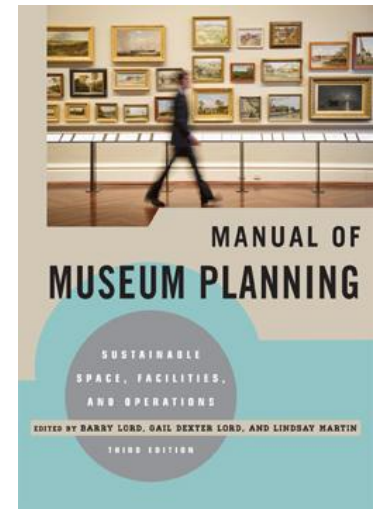
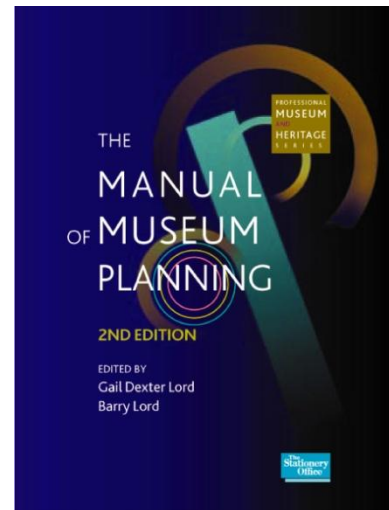
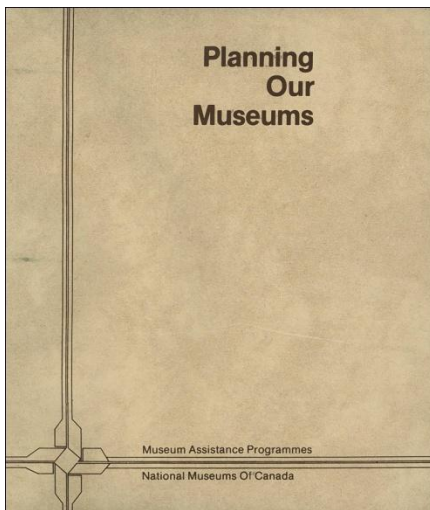
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# MANUAL OF MUSEUM PLANNING: ITS HISTORY AND EVOLUTION



# MMP3 AND OUR PRACTICE



# WHAT'S NEW?

- Emergence of museums as civil society institutions (Chapter 3)
- Planning goals, principals, and assumptions (Section 3.4)
- Understanding the needs of a community (Section 4.1)
- Integrating social spaces into museums (Section 4.5)
- Emphasis on collection storage, digitization, conservation and research (Chapter 7)

# WHAT'S NEW?

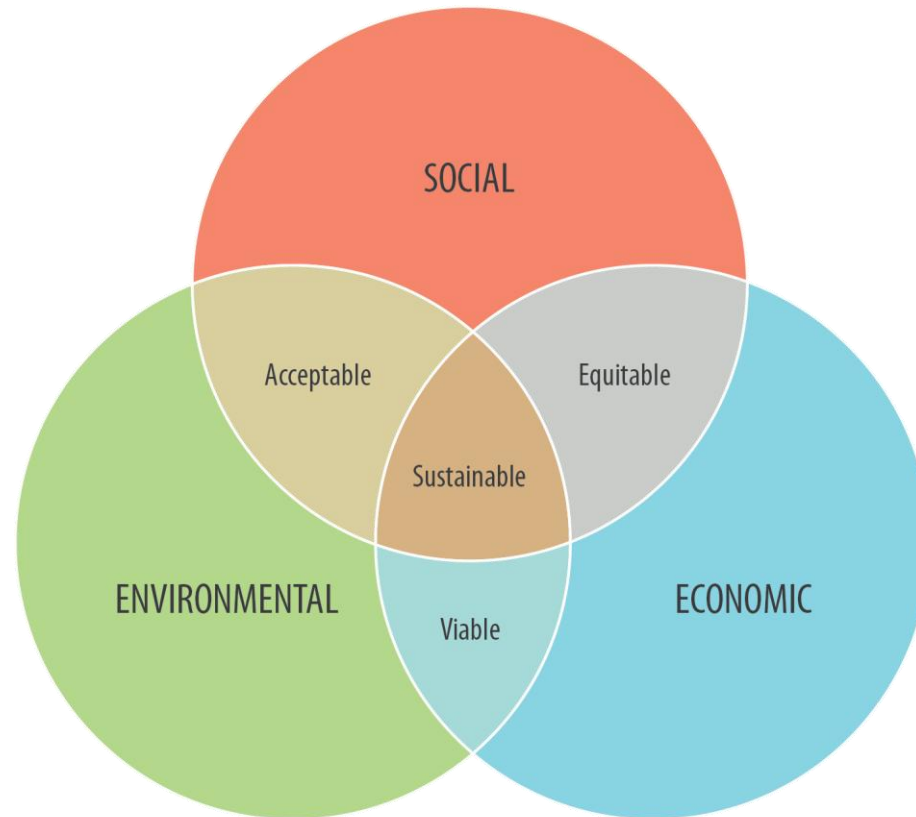
- Explanation of essential planning documents (Part IV)
- Emphasis on sustainability (Chapter 15)
- Consideration of capital costs with regard to funding capability, schedules, phasing (Chapter 16)
- Need for “right-sizing” of new facilities (Section 16.1)
- Run-up to opening day (Chapter 21)
- Sustainable space, facilities, and operations



# DIMENSIONS OF SUSTAINABILITY

- Why?
- How?
- What?
- Who?

# WHY?



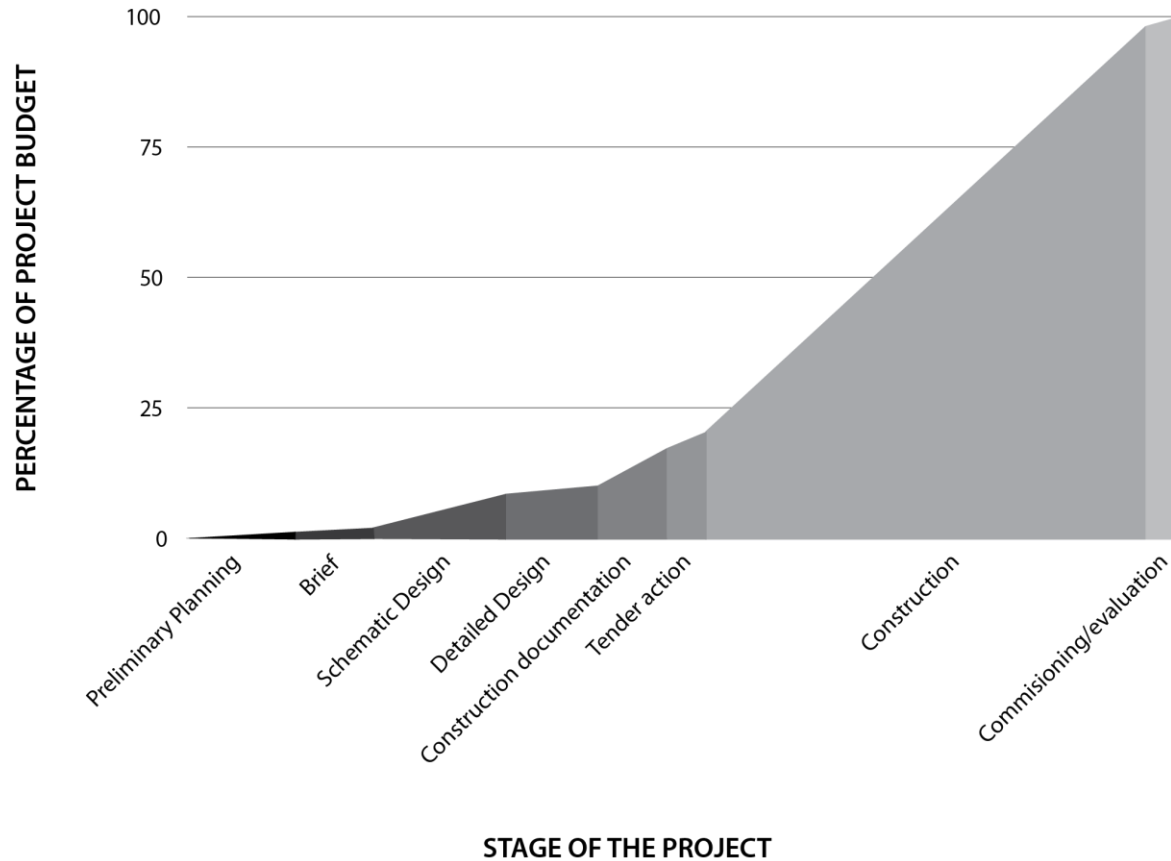
Dimensions of Sustainability

United Nations General Assembly. 2005 World Summit Outcome, Resolution A/60/1, adopted by the General Assembly on 15 September 2005.

Author: Lindsay Martin © AltaMira

*Figure 1.1, page 7*

# WHY?



PROPORTION OF CAPITAL BUDGET INCURRED AT EACH STAGE OF THE PROJECT

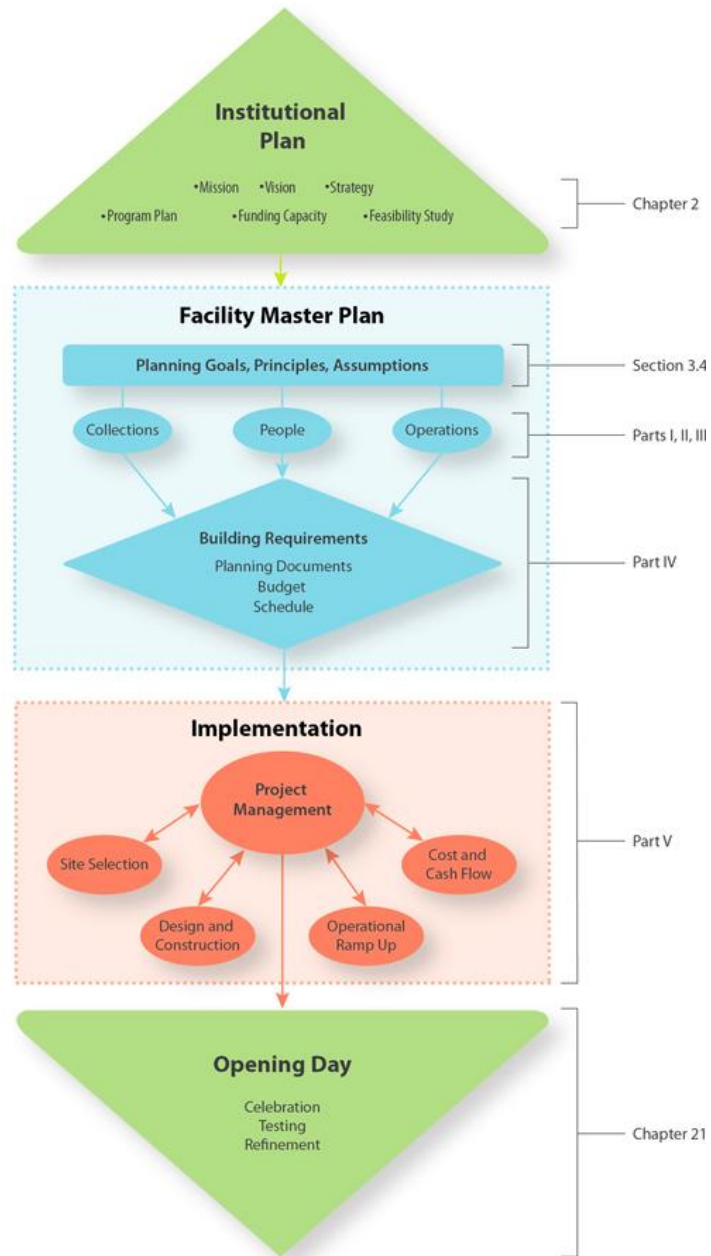
Author: Gail & Barry Lord

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*Figure 2.2, page 14*

# HOW?

MUSEUM PLANNING PROCESS  
Author: Lindsay Martin & Barry Lord  
© Altamira 2012



# HOW?

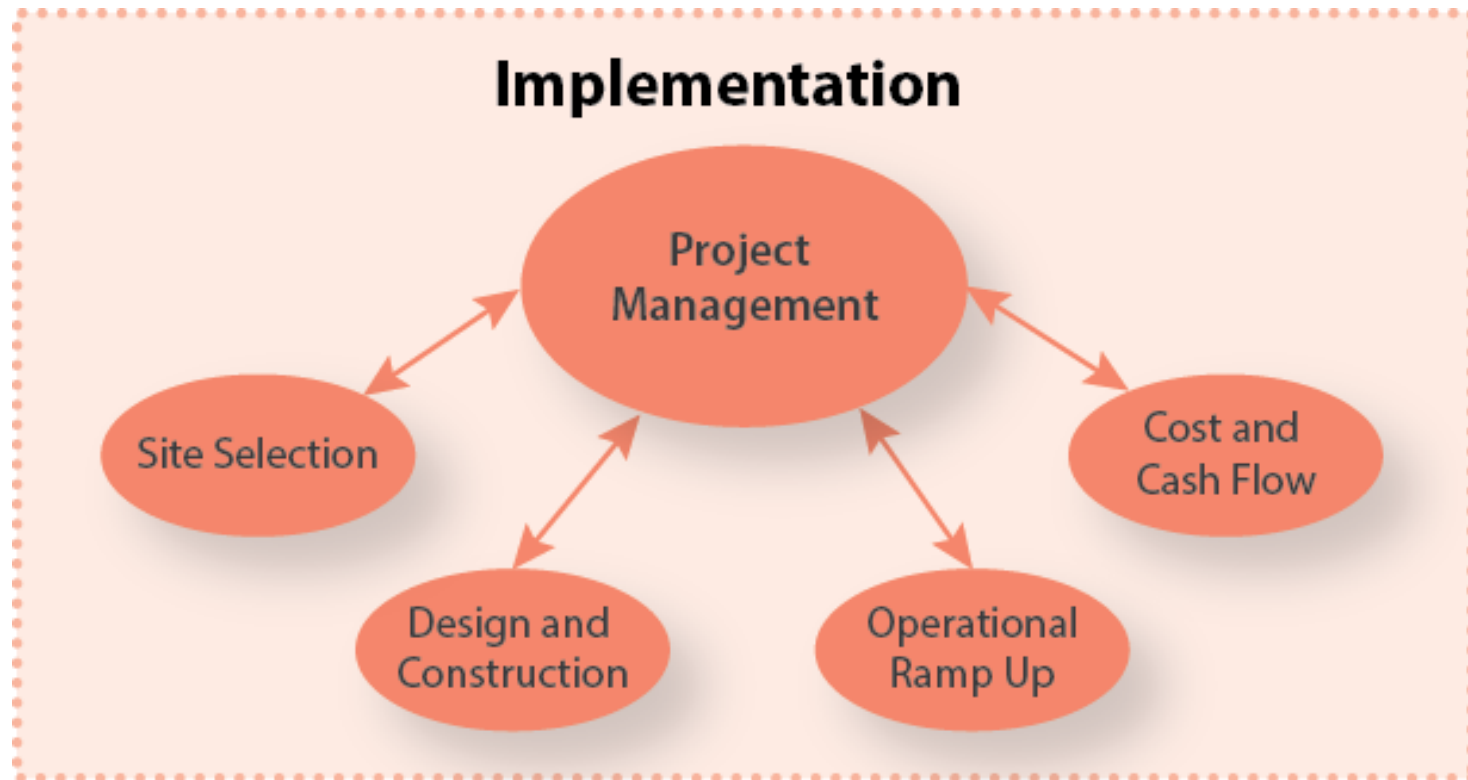
## Institutional Plan

- Mission
- Vision
- Strategy
- Program Plan
- Funding Capacity
- Feasibility Study

# HOW?



# HOW?



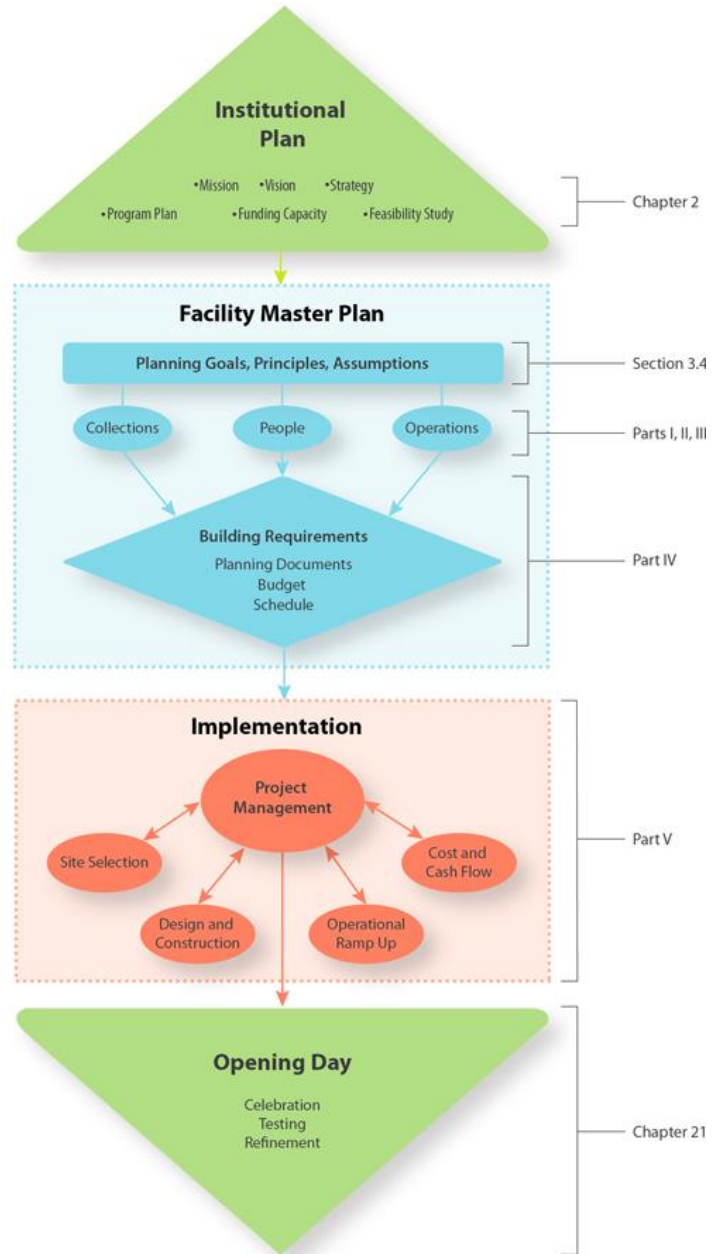
HOW?

## Opening Day

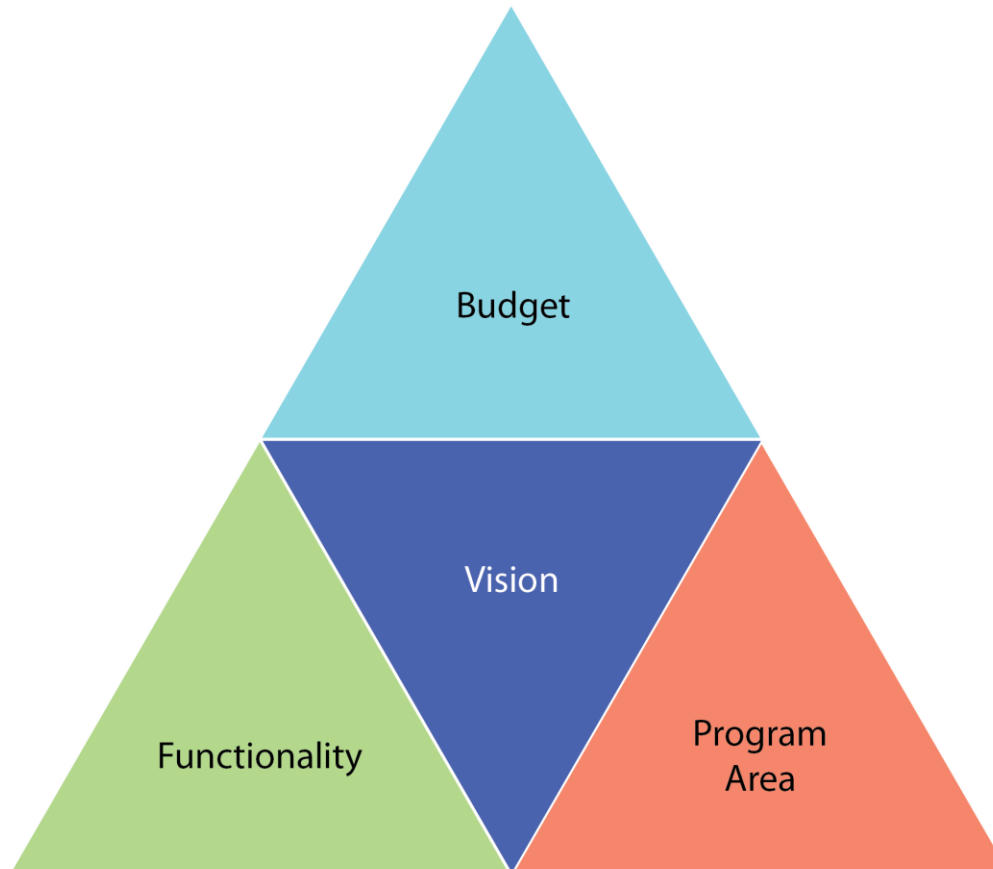
Celebration  
Testing  
Refinement



# HOW?



# WHAT?



THE RIGHT-SIZING TRIANGLE: PROGRAM AREA, BUDGET, AND FUNCTIONALITY  
Author: Catharine Tanner and Barry Lord  
© Altamira 2012

*Figure 16.1, page 515*

# WHO?

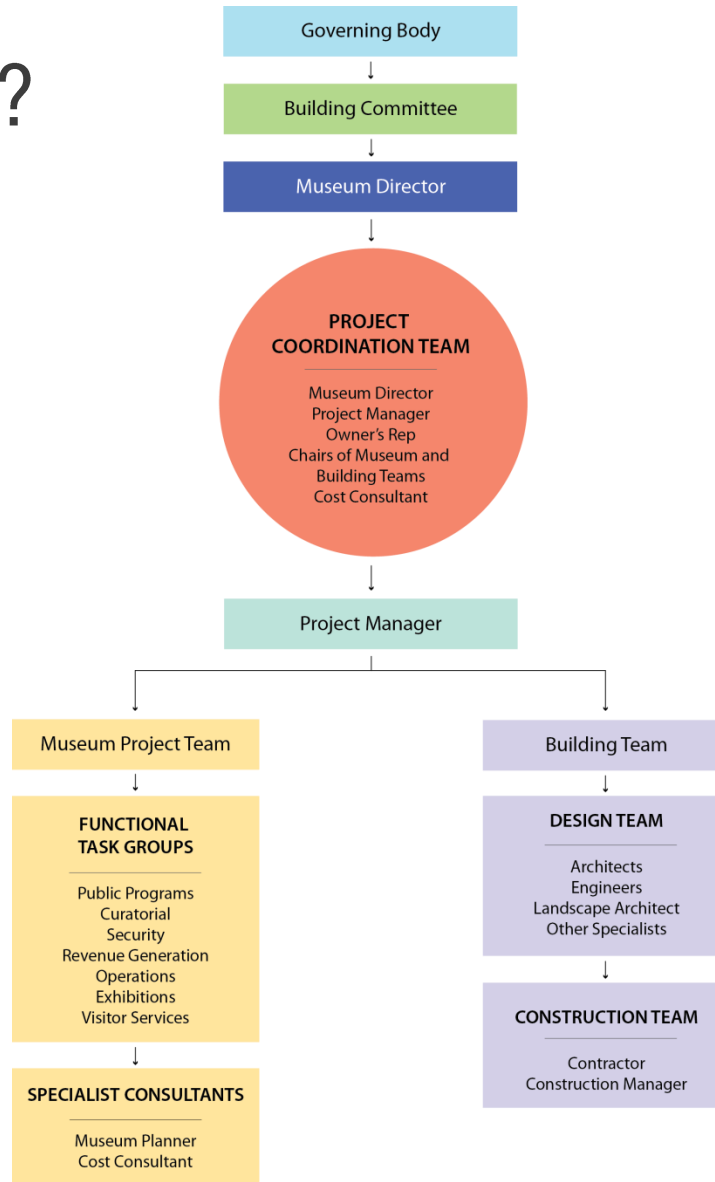
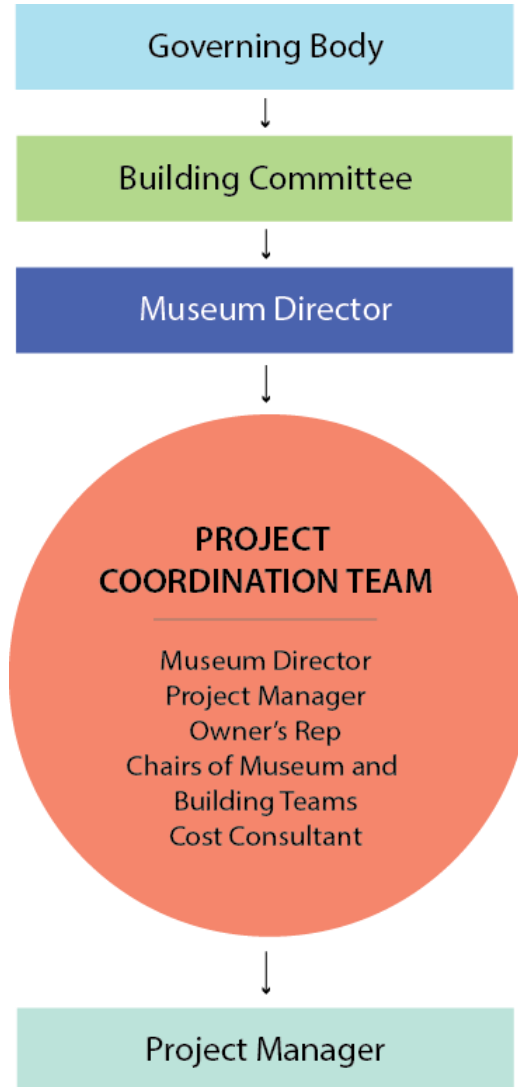
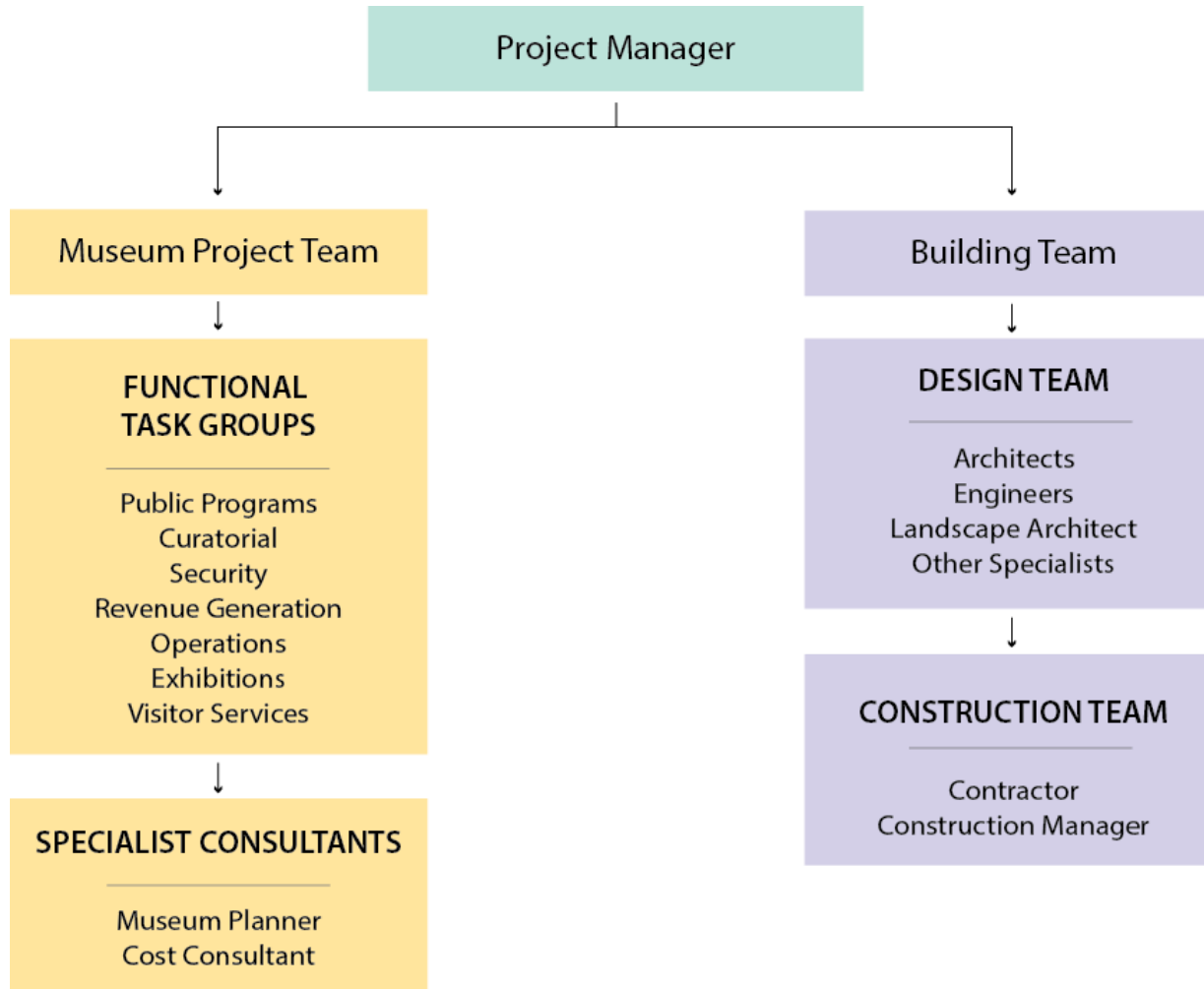


Figure 2.1, page 10

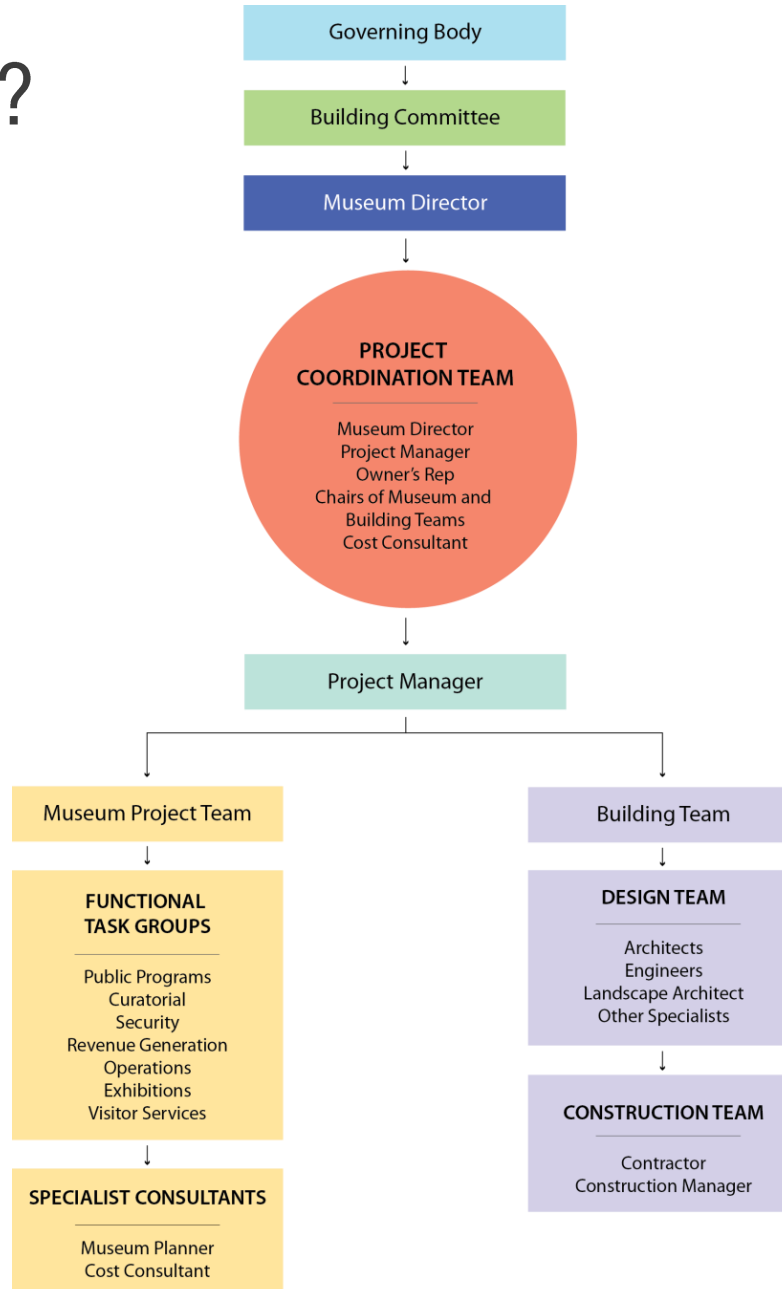
# WHO?



# WHO?



# WHO?



# MMP3 STRUCTURE

- Part I Planning for People
- Part II Planning for Collections
- Part III Planning for Operations
- Part IV Planning for the Building
- Part V Implementation
- [For Further Reading](#) (page 639)
- [Glossary](#) (page 655)

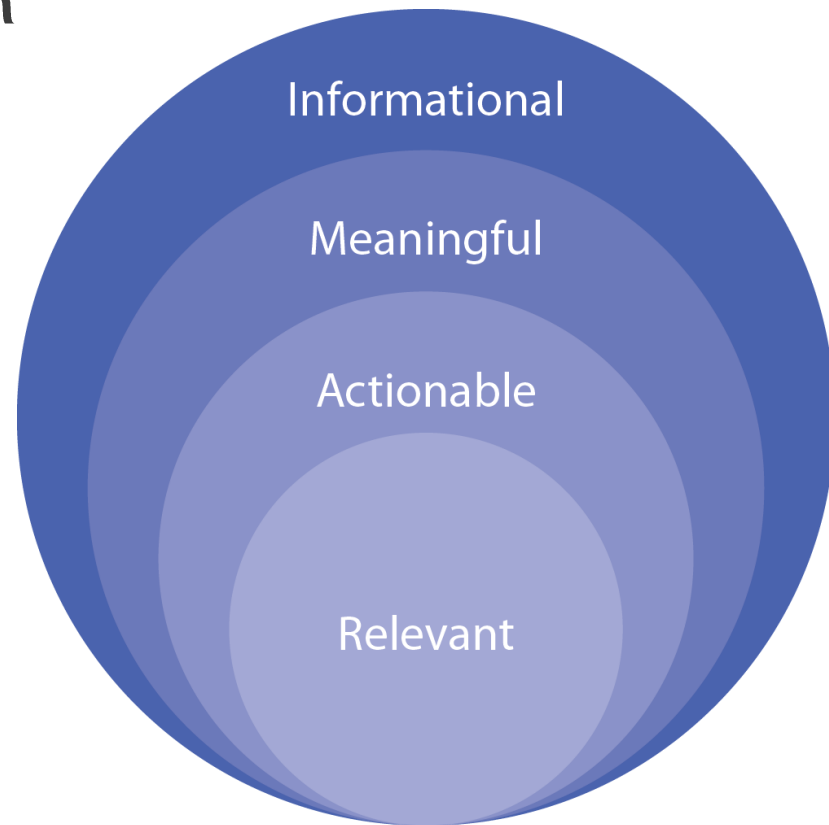
# PART I: PLANNING FOR PEOPLE

Visitor Experience: Figure 4.1  
(page 67) and issues concerning  
an [Interpretive Plan](#).

Understanding Your Community

Author: Joy Bailey

© Altamira 2012





# PART I: PLANNING FOR PEOPLE

## Exhibitions, Interpretation, and Public Programs:

- What is an Exhibition? (4.3.1., page 89)

The phases of [exhibition planning](#) can be summarized under the following headings:

- Research (4.3.2.1, page 91)
- Exhibition Proposal or Brief (4.3.2.2, page 92)
- Exhibition Planning and Design (4.3.2.3., page 93)
- Evaluation (4.3.2.4, page 97)
- Production (4.3.2.5, page 98)
- Operation (4.3.2.6, page 98)



## PART II: PLANNING FOR COLLECTIONS

- Collections Analysis
- Types of Collections
- Collection Roles and Uses
- Collection Policy
- Collection Management
- Space Requirements

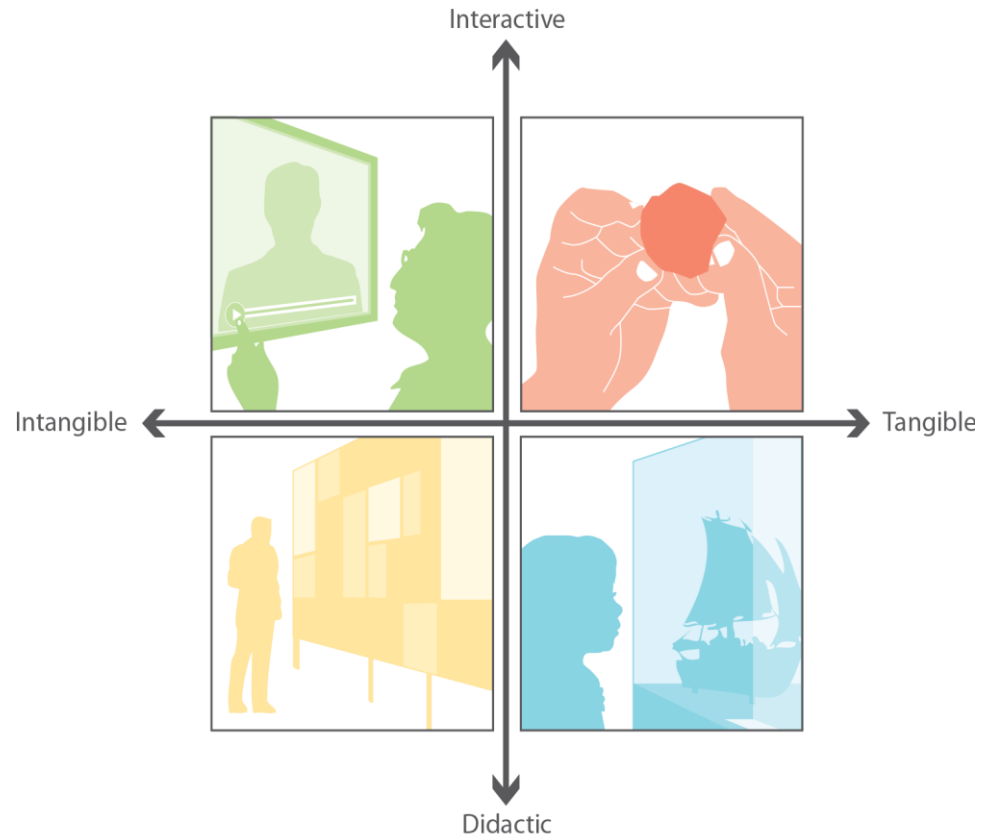


Figure 5.1 Spectrum of [Collection-Based Interpretation](#) (page 194)

Spectrum of Collection-Based Interpretation

Author: Brad King

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# PART III: PLANNING FOR OPERATIONS

- [Typical Day in the Life of a Museum](#) (Table 9.1, page 354) provides a schematic glimpse into a typical day in the life of a museum with traditional operating hours.
- [Planning for safety and security](#) are visually illustrated by the diagrams throughout Chapter 10 (page 365)

# PART III: PLANNING FOR OPERATIONS

## Developing **Staffing Plans**: Section 12.2 (page 419)

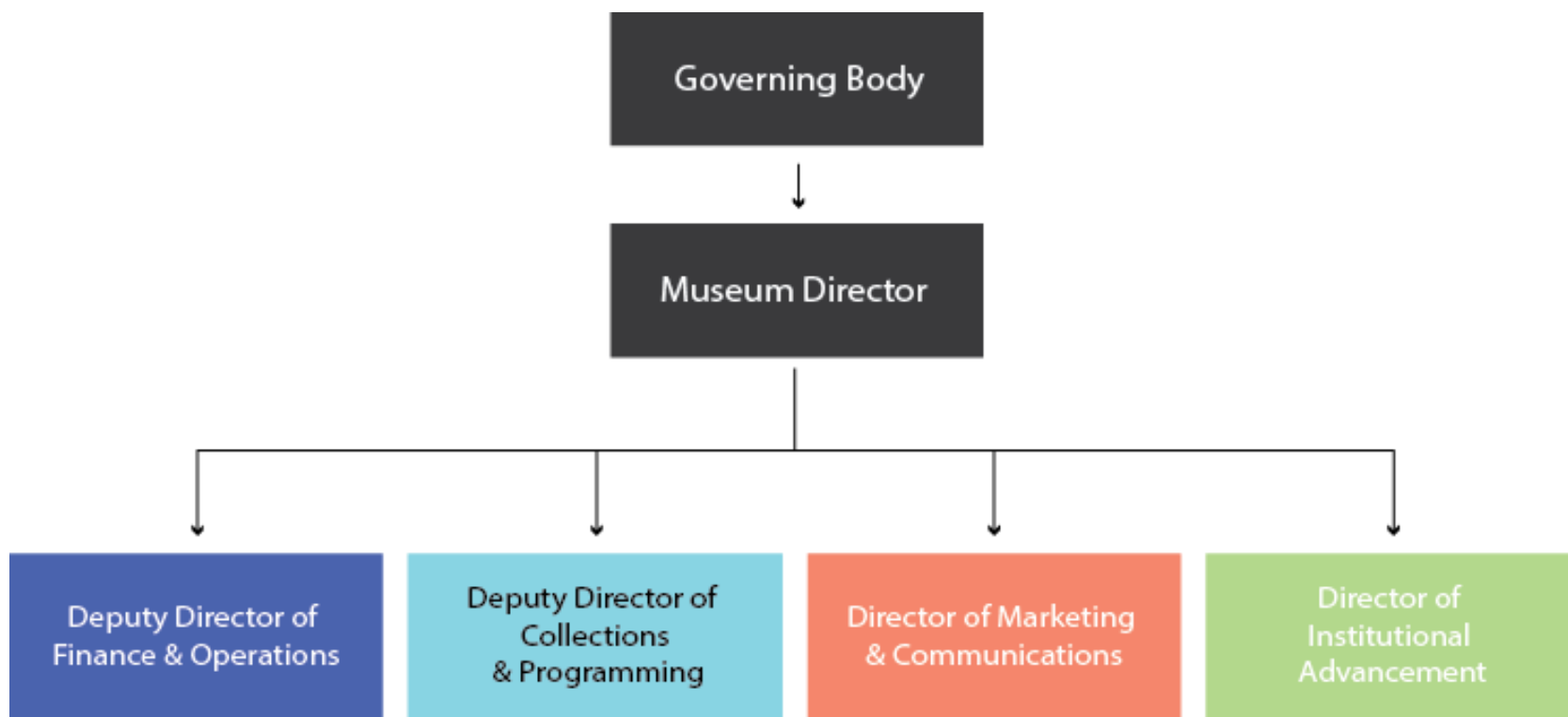
Four Pillars Organizational Structure for a Museum

Author: Amy Kaufman

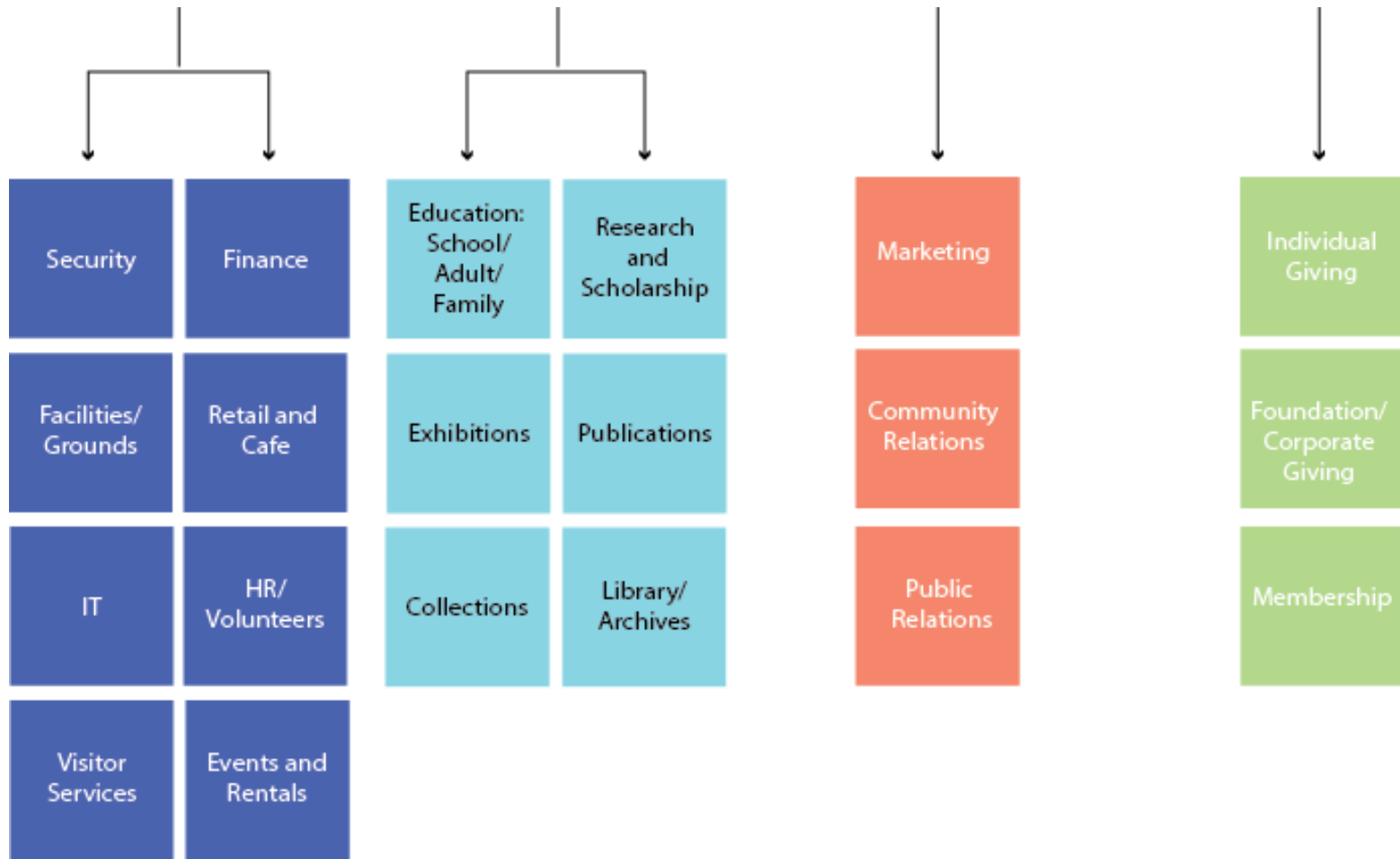
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# PART III: PLANNING FOR OPERATIONS



# PART III: PLANNING FOR OPERATIONS



# PART III: PLANNING FOR OPERATIONS



# PART III: PLANNING FOR OPERATIONS

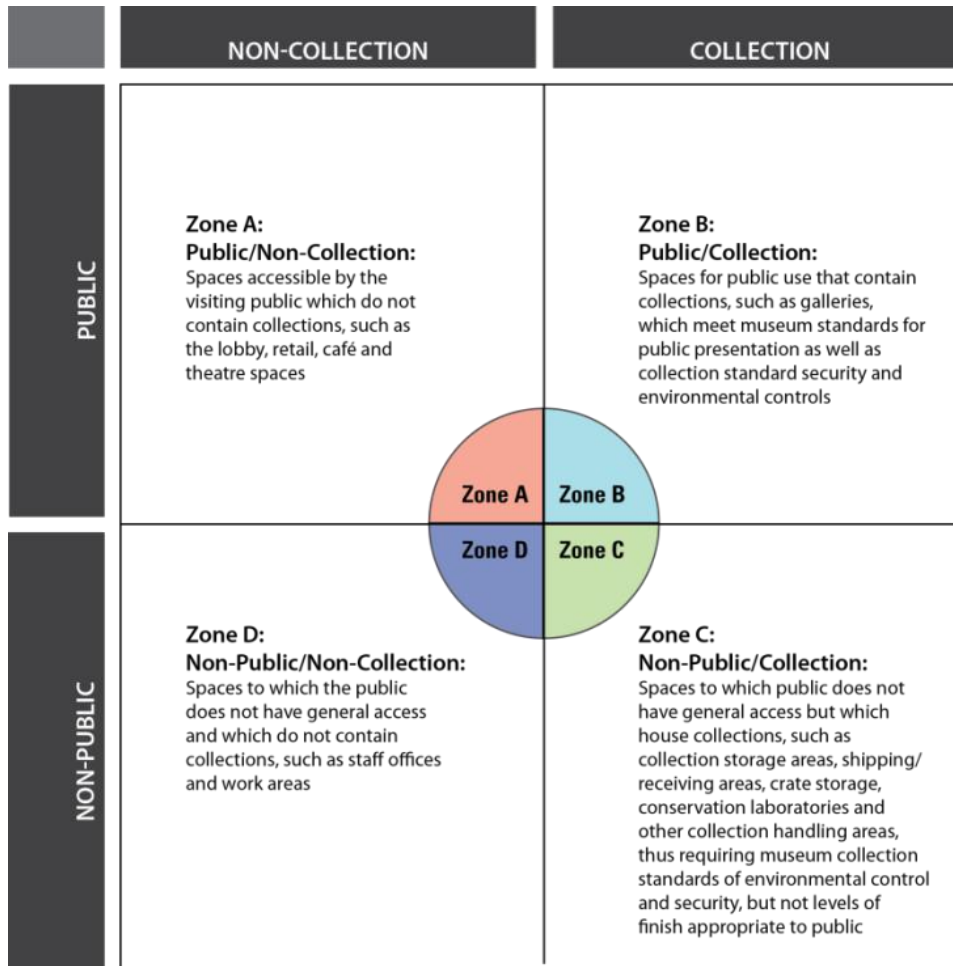
- Attendance, Operating Revenue, and Expense Projections:
  - Operating assumptions
  - How to calculate attendance projections
  - Sample attendance projections for a hypothetical museum
  - Overview of revenue projections
  - How to calculate expense projections



# PART IV: PLANNING FOR THE BUILDING

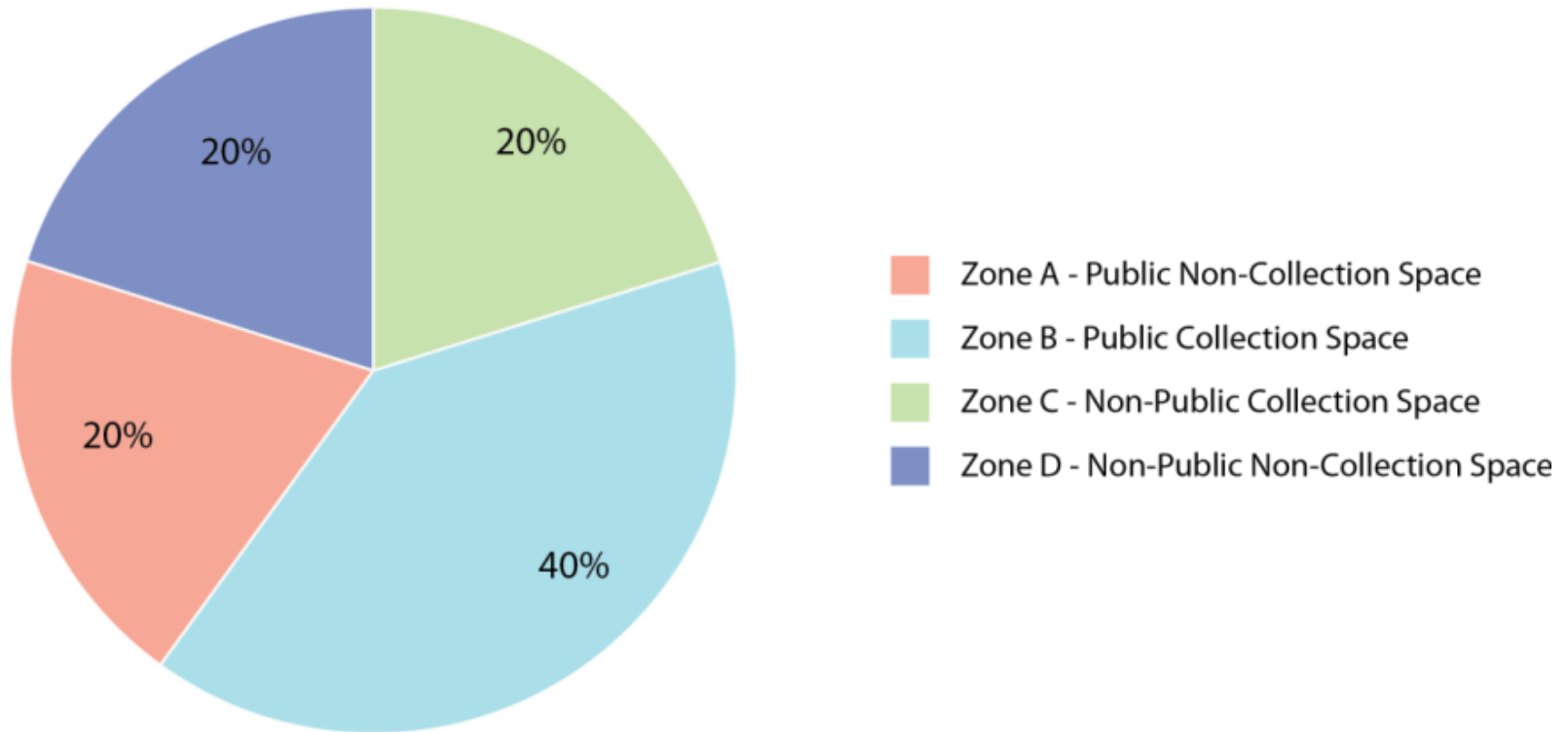
- Section IV (page 455): Planning for the Building demonstrates the results of the analysis in parts I-III of this *Manual* can be brought together to develop a:
  - **Facility Strategy**;
  - **Functional Program** (which includes all the elements of a Facility Strategy but also adds Room Data Sheets), or **Brief**.

# PART IV: PLANNING FOR THE BUILDING



Four-Zone Diagram  
 Author: Barry Lord  
 © Altamira 2012

# PART IV: PLANNING FOR THE BUILDING



Normative Distribution of Museum Zones

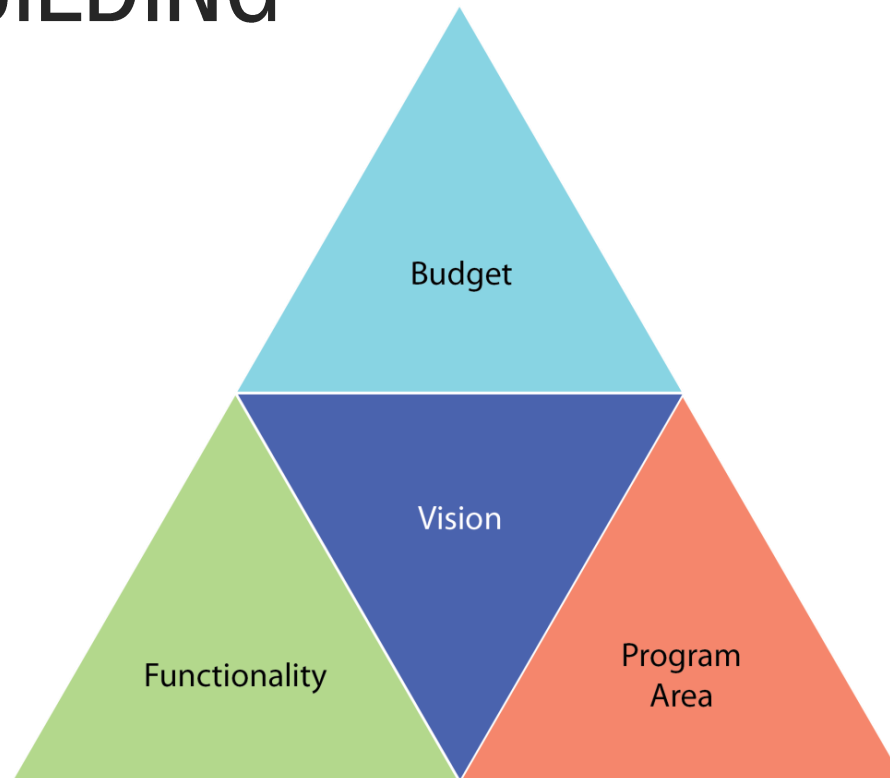
Author: Barry Lord

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# PART IV: PLANNING FOR THE BUILDING

- Section 15.3 (page 499): Overview of Sustainability Opportunities for Museums such as:
  - Providing Leadership in Sustainability
  - Ensuring Long-Term Sustainability vis-à-vis the Planning Process
  - Sustainability Policy and Action Plan
  - Sustainability Standards and Metrics

# PART IV: PLANNING FOR THE BUILDING



Emphasis on the importance of ensuring the museum planning project is “right-sized” (Chapter 16)

The Right-Sizing Triangle: Program Area, Budget, and Functionality

Author: Catharine Tanner and Barry Lord

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# PART V: IMPLEMENTATION

- Chapter 17 (page 541) defines [project management](#)
  - meet the client's vision, goals, and objectives;
  - be completed on time;
  - be completed within budget;
  - achieve the quality of work envisioned.
- Chapter 18 details information about the [site selection process](#)
- Chapter 19 describes the [design and construction team](#) (section 19.1) and the [stages through which their work progresses](#) (19.2), [architect selection](#) (19.3), and [exhibition designer selection](#) (19.4). [Contracting options](#) with regard to the design and construction phase are discussed as well (19.5).

# PART V: IMPLEMENTATION

- Chapter 20 explains how to properly manage costs and cash flow by detailing:
  - the role of the [cost consultant](#) (page 600)
  - [cost factors](#) specific to museums (page 604)
  - [life-cycle costing](#) (page 605)
  - [value engineering](#) (page 606)
  - [cash flow](#) (page 609)
  - [financing options](#) (page 613)

# PART V: IMPLEMENTATION

## A. PLANNING

- Vision and Mission
- Feasibility Study or Business Plan
- Board Development and Fundraising
- Collection Analysis and Development Strategy
- Facilities Strategy and Functional Program or Brief
- Selection of Architect and Project Manager

## B. DEVELOPMENT

- Branding
- Organizational Ramp-Up: Phase 1
- Launch Capital Campaign, including Endowment
- Collection and Exhibition Development & Design
- Monitor Fulfillment of Brief
- Building Design, Documentation, Construction

## C. IMPLEMENTATION

- Communications Roll-Out
- Organizational Ramp-Up: Phase 2
- Transition from Capital to Operating Budget
- Fabrication, Installation and Testing of Exhibits
- Staff Begin Operations
- Commissioning and Testing of Building: Opening Day!

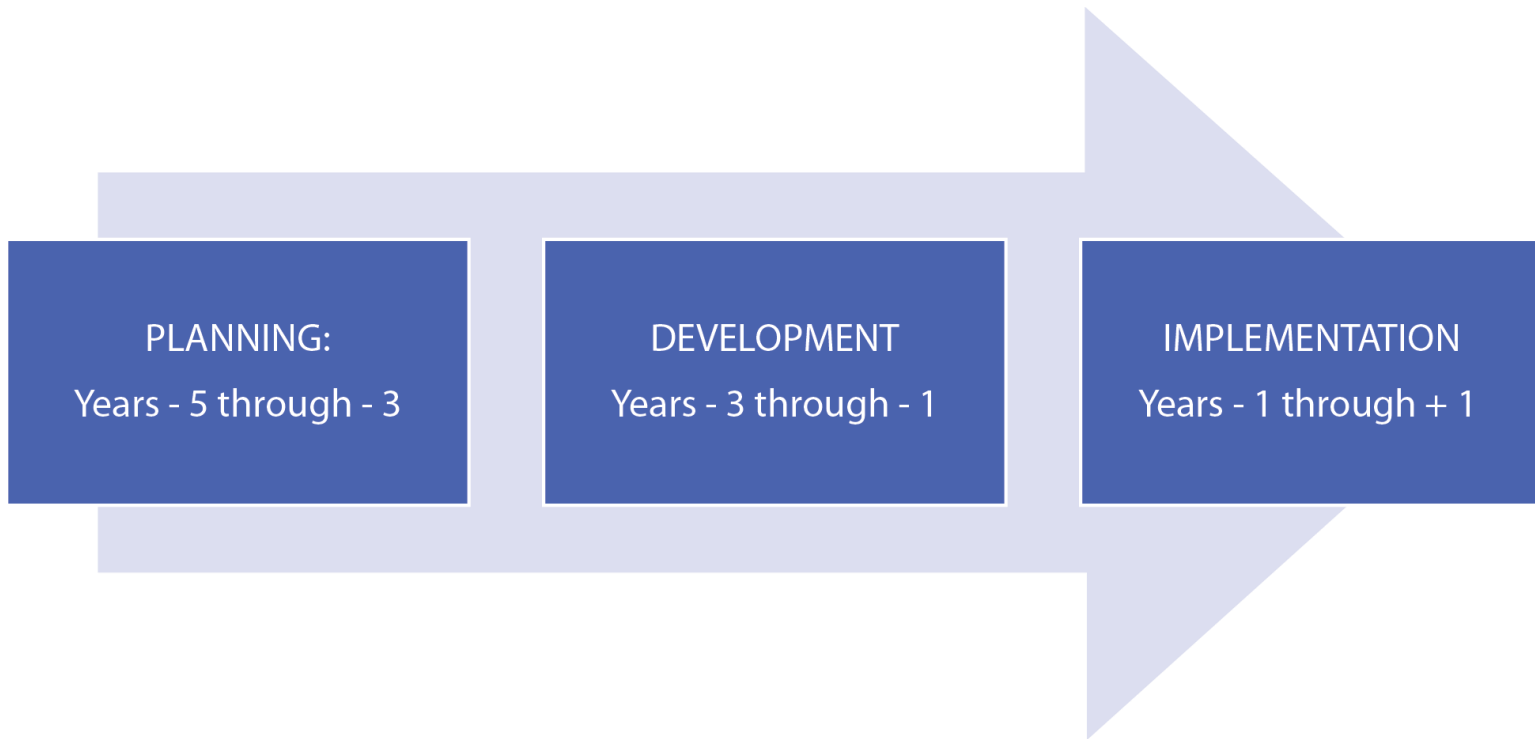
### MAJOR MILESTONES

Author: Amy Kaufman

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# PART V: IMPLEMENTATION





QUESTIONS?