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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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
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?

Institutional Plan

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

Planning Goals, Principles, Assumptions

- Collections
- People
- Operations

Building Requirements
- Planning Documents
- Budget
- Schedule
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?

- Governing Body
- Building Committee
- Museum Director
- Project Manager
- Museum Director
- Project Manager
- Owner's Rep
- Chairs of Museum and Building Teams
- Cost Consultant
- Museum Project Team
- Building Team
  - DESIGN TEAM
    - Architects
    - Engineers
    - Landscape Architect
    - Other Specialists
  - CONSTRUCTION TEAM
    - Contractor
    - Construction Manager

FUNCTIONAL TASK GROUPS
- Public Programs
- Curatorial
- Security
- Revenue Generation
- Operations
- Exhibitions
- Visitor Services

SPECIALIST CONSULTANTS
- Museum Planner
- Cost Consultant

Figure 2.1, page 10

ROLES AND RESPONSIBILITIES IN A MUSEUM CAPITAL PROJECT
Author: Lindsay Martin & Barry Lord
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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
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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
© Altamira 2012
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

- Governing Body
- Museum Director
  - Deputy Director of Finance & Operations
  - Deputy Director of Collections & Programming
  - Director of Marketing & Communications
  - Director of Institutional Advancement
PART III: PLANNING FOR OPERATIONS

- Security
- Finance
- Facilities/Grounds
- Retail and Cafe
- IT
- HR/Volunteers
- Visitor Services
- Events and Rentals
- Education: School/Adult/Family
- Exhibitions
- Collections
- Library/Archives
- Research and Scholarship
- Publications
- Marketing
- Community Relations
- Public Relations
- Individual Giving
- Foundation/Corporate Giving
- Membership
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

Zone A: Public/Non-Collection:
Spaces accessible by the visiting public which do not contain collections, such as the lobby, retail, café and theatre spaces

Zone B: Public/Collection:
Spaces for public use that contain collections, such as galleries, which meet museum standards for public presentation as well as collection standard security and environmental controls

Zone D: Non-Public/Non-Collection:
Spaces to which the public does not have general access and which do not contain collections, such as staff offices and work areas

Zone C: Non-Public/Collection:
Spaces to which public does not have general access but which house collections, such as collection storage areas, shipping/receiving areas, crate storage, conservation laboratories and other collection handling areas, thus requiring museum collection standards of environmental control and security, but not levels of finish appropriate to public

Four-Zone Diagram
Author: Barry Lord
© Altamira 2012
PART IV: PLANNING FOR THE BUILDING

Normative Distribution of Museum Zones
Author: Barry Lord
© Altamira 2012
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 or 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

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<td>• Board Development and Fundraising</td>
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<td>• Selection of Architect and Project Manager</td>
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MAJOR MILESTONES
Author: Amy Kaufman
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PART V: IMPLEMENTATION

PLANNING: Years - 5 through - 3

DEVELOPMENT Years - 3 through - 1

IMPLEMENTATION Years - 1 through + 1
QUESTIONS?