

Museum Information Management: Adapting to Change

Quick Guide 2: Surviving Separation

Introduction

Many museums are experiencing a reduction in resources and/or changes to their status or governance. Whatever the size, type, location or funding of your museum, it is likely that it will need to withstand the impact of significant change in the economic environment.

Your museum's information policies and its ability to sustain coherent information management can be significant tools to help your museum survive and thrive in difficult times.

Surviving Separation is the second in a series of six *Quick Guides*, aimed at helping museums identify and address the kinds of information management issues likely to arise from the kind of change now being experienced across the sector. This *Quick Guide* will take you through the process of understanding, assessing and responding to a situation where your museum might be separating from a parent organisation.

Scope

Quick Guide 2: Surviving Separation provides you with:

- An understanding of organisational separation and the potential impact on your museum
- Guidance for assessing the nature and impact of organisational separation on the way you manage information in your museum
- A framework for identifying issues and opportunities arising from organisational separation
- A process for addressing issues and building on opportunities arising from separation
- References for further reading

Principles

Many museums are owned and managed by a parent organisation (e.g. a local authority or a public or private company) or they may be part of a wider trading partnership of museums or other organisations. Separation from parent or partner organisations may arise as a result of numerous external factors, including economic pressure, organisational re-focusing or political influence. In recent years many museums have chosen to devolve from parent organisations in order to enable them to work more autonomously. Whatever the reason for separation, a devolved museum will need to establish itself as an independent legal entity with an appropriately amended constitution. *Quick Guide 1: Understanding Change* identified six key types of change which a museum might experience. We can use these to illustrate the **effect of organisational separation** on your museum:

The governance of your museum	<ul style="list-style-type: none"> • Separation will necessitate change to the governance of your museum by necessity; this is likely to trigger other changes.
The role or goals of your museum	<ul style="list-style-type: none"> • With new governance in place and the likelihood of changes to funding source(s) it is possible that the focus of your museum may shift to reflect these changes.
The way in which your museum works to achieve its goals	<ul style="list-style-type: none"> • Changes to governance will mean that your museum will need to review fundamental aspects of its operations, including links to other organisations, collecting and audience priorities, policies and procedures.
The way in which your museum is organised	<ul style="list-style-type: none"> • The absence of a parent or partner organisation will affect the roles and responsibilities of staff within your museum. • Individuals may need to develop new skills or work with specialist contractors; the way in which departments are structured may change.

<p>The staff and budgets available</p>	<ul style="list-style-type: none"> • Staff from a partner or parent organisation may no longer be available to sustain core functions (e.g. HR, Finance); these services may need to be purchased from former partner/parent organisations or from third parties. • Funding arrangements will change; sometimes temporary transitional funding will be available but in the longer term your museum will need to establish multiple funding streams to sustain its operations.
<p>The tools and systems available</p>	<ul style="list-style-type: none"> • Your museum may have relied on infrastructure, particularly IT systems, accommodation or office equipment which may no longer be available in the same way.

Identifying issues and opportunities

Separation is likely to affect all areas of your museum’s operations. Even though you may not be actively involved in the decision-making processes relating to separation, it will be important for you to understand the **impact on information management** in order to inform your museum about potential issues and opportunities and to address these effectively. Consider the questions in each of the key areas of your museum listed below in order to develop an understanding of what this might mean for information management in your museum.

Area	Possible impact of separation	Questions to consider
<p>The core goals and strategic aims of your museum</p>	<ul style="list-style-type: none"> • The information your museum needs in order to be able to carry out key functions may change if your museum’s core goals change. • This may mean refocusing on new types of information, necessitating a shift in emphasis from previous information priorities. 	<ul style="list-style-type: none"> • What are your primary information management objectives? • Are you clear about these, and how they link to your museum’s goals? • How might these change in the next 5 years? • What key groups of information do you need to manage the new organisation?
<p>The service levels you are able to sustain</p>	<ul style="list-style-type: none"> • Most museum services are dependent to some extent on access to information services and resources (e.g. learning, research, exhibition development, collections management, public enquiries). • You may need to review the information services you currently offer to different user groups, including staff and external users. • Some services may need to be prioritised to reflect core goals; others may need to generate income or be delivered differently in order to be sustained. 	<ul style="list-style-type: none"> • What types of information service are you best at providing? What are your known weaknesses? • How might separation strengthen or undermine these strengths and weaknesses? • What will be the reaction of users and stakeholders to changes in delivery?

Area	Possible impact of separation	Questions to consider
<p>The logistics of how your museum works on a day-to-day basis</p>	<ul style="list-style-type: none"> You may need to reconsider the logistics of how you provide information services from a range of perspectives. Review the allocation of responsibilities for information management - who does what? Consider the procedures, systems, communications and accommodation currently used to manage your museum's information. 	<ul style="list-style-type: none"> Are there other ways you could deliver some of the services you provide? Is the balance between centralised services and the responsibilities of individual staff, a sustainable one? What are the likely practical, physical and technical impacts of separation?
<p>The legal, ethical and professional expectations and responsibilities placed on your museum</p>	<ul style="list-style-type: none"> Your museum may have depended upon its parent organisation in order to deliver HR, Finance, ICT and other corporate services which are both dependent upon and required for, effective information management. These services may no longer be available in the same way. There are core values and operations which your museum must fulfill in order to function as a museum. These relate to a number of areas including accountability, access and collections management - all of which require effective information management in order to be carried out properly. 	<ul style="list-style-type: none"> What are the core legal, governance and accountability responsibilities that your museum is mandated to maintain? What corporate support might no longer be available? What might be the gaps in your museum's ability to fulfill its professional and ethical responsibilities?
<p>The finances and resources available to your museum</p>	<ul style="list-style-type: none"> Separation will inevitably affect the availability of funding, staff, skills, accommodation and a range of other resources required to manage information resources. Initial changes in resources available are likely to be followed by a need to monitor use of resources and respond to continued change. 	<ul style="list-style-type: none"> Be prepared to cost your information management activities in order to aid decision-making. Are there areas of potential saving due to separation? Are there areas of likely overspend arising from separation?

What you can do

To understand how separation might affect your museum, follow these steps:

1. Understand the fundamental **effects of organisational separation** on your museum
2. Assess the likely **impact of change** on different aspects of your museum's information management activities, identifying likely issues and opportunities
3. Use *Quick Guide 4: Risk Assessment* and *Quick Guide 5: Maximising Opportunities* to assess and prioritise issues and opportunities

Once you have a better understanding of the likely impact of separation on information management in your museum you will be in a better position to prepare for that change.

Further reading

The other five Quick Guides in this series provide more detailed advice on the steps to follow to help ensure that your information management is in the best possible shape to support your museum in times of change. The other titles in the series are:

Quick Guide 1: Understanding Change
Quick Guide 3: Museum Mergers
Quick Guide 4: Assessing Risk
Quick Guide 5: Maximising Opportunities
Quick Guide 6: Real-life Implementation

The following guidance documents published by MLA prior to its closure remain relevant:

Moving to Museum Trusts: Learning from Experience
Part 1: Strategic Overview
Part 2: The Process of Devolution

The opportunity of devolution for museums, libraries and archives. Museums, Libraries and Archives, 2010

The documents are available from:

<http://www.egeria.org.uk/online-resources/>