

Museum Information Management: Adapting to Change

Quick Guide 3: Museum Mergers

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.

Museum Mergers is the third 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 is to merge with another organisation.

Scope

Quick Guide 3: Museum Mergers provides you with:

- An understanding of mergers and the potential **informational** impact on your museum
- Guidance for assessing the nature and impact of a merger on your museum
- A framework for identifying issues and building on opportunities arising from a merger with another organisation
- References for further reading

Principles

There are a number of reasons why museums who currently exist as independent entities might seek to merge with peer organisations. Where two or more museums have complementary or overlapping collections a merger may be an opportunity to provide an improved service to users. Particularly during tough economic times a merger may also remove the need to compete for a decreasing audience share. Where funding for different types of complementary organisation come from a single source (e.g. a local authority) a merger may be the only way of sustaining a range of services albeit from within a single organisation. Whatever the reason for a merger, it will be important to understand how it is likely to affect your museum. *Quick Guide 1: Understanding Change* identified six key types of change which a museum might experience in relation to different aspects of its operations. We can use these to illustrate the **effect of a merger** with another organisation:

<p>The governance of your museum</p>	<ul style="list-style-type: none"> • When organisations merge the change will be felt first at the level of governance. • Decisions made by a newly-defined governing body will inevitably trigger other changes throughout the merged organisation.
<p>The role or goals of your museum</p>	<ul style="list-style-type: none"> • Depending on the remit of the organisation your museum is merging with, the goals of the merged organisation are likely to be differently defined.
<p>The way in which your museum works to achieve its goals</p>	<ul style="list-style-type: none"> • The organisation your museum merges with may work in a different way depending on its previous remit. • Organisational culture, established best practice, policies and procedures may all be different and will need to be reconciled.
<p>The way in which your museum is organised</p>	<ul style="list-style-type: none"> • The structure of the newly-merged organisation will need to take account of potential overlaps and gaps in service. • Any new structure will also need to enable effective communication and collaborative working across the new organisation.

The staff and budgets available	<ul style="list-style-type: none"> • In order to achieve the economies of scale which may have been anticipated for the merged organisation, it is likely that there will need to be changes to available staff and funds. • It may take time for staff roles and skills requirements to be understood and agreed.
The tools and systems available	<ul style="list-style-type: none"> • All partners in a merged organisation will bring their legacy accommodation, systems and equipment to the new organisation. • These may not always be appropriate to support a single large organisation and its broader functions.

Identifying issues and opportunities

Issues arising from a merger with another organisation may appear simply to be restricted to physical or administrative aspects of your museum. However the reality is that change of this nature will impact on all areas of your museum's operations in some way. Information management is a fundamental part of everything your museum does; as such it is important to understand the real impact of such change. Even though you may not be actively involved in the decision-making processes relating to a merger, 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 manage these effectively. Consider the questions in each of the key areas of your museum listed below in order to develop an understanding of what a merger might mean for information management in your museum.

Area	Possible impact of merger	Questions to consider
The core goals and strategic aims of your museum	<ul style="list-style-type: none"> • A newly merged organisation will need to reassess its core goals and strategic aims. • It will need access to management information so inform this process. • The information services and tools your museum needs in order to be able to carry out key functions may change if your museum's core goals change. 	<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?
The service levels you are able to sustain	<ul style="list-style-type: none"> • The merged organisation may be larger than either of its precursor organisations. • Information management may need to be scaled up to support this growth; it may also need to support completely new types of service. • Your information management may need to meet the demands of new funding requirements, user demands and organisational expectations. • A merger may provide access to new audiences, content and skills which may enable you to enhance the information services and products you offer. • It will be important to establish whether, and how, opportunities and new demands can 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 a merger with another organisation strengthen or undermine these strengths and weaknesses? • What are the expectations of different users and stakeholders • How can these be met?

Area	Possible impact of merger	Questions to consider
<p>The logistics of how your museum works on a day-to-day basis</p>	<ul style="list-style-type: none"> • The structure of the newly-merged organisation will need to take account of potential overlaps and gaps in its operations. • This may impact on information management, particularly if the new organisation is substantially larger than either previous organisation. • The merged organisation may require a new departmental structure. • Effective information management will be central to ensuring the success of this new structure, responding to political as well as logistical and communication issues 	<ul style="list-style-type: none"> • What are the differences and areas of overlap in the information services provided by the precursor organisations? • Does the new organisation require new kinds of service to enable it to work effectively? • What are the likely practical, physical, technical and political impacts of the merger?
<p>The legal, ethical and professional expectations and responsibilities placed on your museum</p>	<ul style="list-style-type: none"> • The merged organisation may be required to take on new responsibilities which were not previously within the remit of one organisation in the merger. • Staff may be required to develop the skills and awareness to enable them to take on these responsibilities and to work effectively within new professional environments. • Information policies and procedures will be essential to support effective working, as will access to the appropriate information resources. 	<ul style="list-style-type: none"> • What are the core legal, governance and accountability responsibilities that your museum is mandated to maintain? • Are there new responsibilities which one or even neither precursor organisation delivered previously? • What are the areas of skills development and cultural change which information management will be expected to support?
<p>The finances and resources available to your museum</p>	<ul style="list-style-type: none"> • Although a merged organisation may have access to additional resources, these will be required to support a wider range of activities and corporate responsibilities • You may need to justify access to additional staff, skills and resources in order to fulfill larger or more complex of information management services. • The merged organisation may demand short-term increases in expenditure in order to reconcile systems, information resources and processes. 	<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 the merger? • Are there areas of likely overspend arising from the requirements of the merged organisation?

What you can do

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

1. Review the fundamental **effects of a merger** on your museum
2. Assess the likely **impact on information management** of a merger with another organisation, identifying likely issues and opportunities
3. Use *Quick Guide 4: Risk Assessment* and *Quick Guide 5: Maximising Opportunities* to assess, prioritise and manage issues and opportunities

Once you have a better understanding of the likely impact of a merger on information management in your museum, you will be in a better position to prepare for and take advantage of the 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 2: Surviving Separation*
- Quick Guide 4: Assessing Risk*
- Quick Guide 5: Maximising Opportunities*
- Quick Guide 6: Real-life Implementation*

The *Choices for Change* website, developed by Museums Galleries Scotland, contains toolkits to help you review and understand your museum's governance as well as to assess the economic impact of your museum. www.choicesforchange.info