



# The Effective Management of Museums: Cohesive Leadership and Visitor- Focused Public Programming

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## Introduction

This is the final paper of a project commenced in 1995 which has explored what constitutes effectiveness in museums. From experts we sought *assessments* of effectiveness for a range of museums (and an indication of the extent to which research, collections, public programs and marketing contributed to those assessments) and from staff of those museums we sought responses to a *questionnaire* on management practices (see Methods below; the questionnaire is printed as Appendix A): the assessments and questionnaire responses were compared. We accept Kahn's definition of effectiveness (in Goodman *et al.*, 1981, p. 240), "meeting the constraints and meeting or exceeding the goals specified by the dominant coalition [of constituencies]". Further, outcomes should be related to the policy framework in which the organisation works and to the objectives the organisation seeks to achieve (Osborne *et al.*, 1995). We recognise that what constitutes effectiveness often depends on who one asks—different constituencies have different views deriving from the nature of their exchange with the organisation—and that effectiveness is a construct both value-based and time-specific, a political rather than scientific concept (Kanter and Brinkerhoff, 1981). We have used approaches to the assessment of effectiveness which attempt to mirror the perceptions of significant constituencies, rather than ones which those who manage and work in museums think are appropriate.<sup>1</sup>

So far this project has identified a suite of some 28 items as characterising those museums rated by experts as most effective—by reputation (Griffin *et al.*, 1999). These include a concern for quality, shared goals, good communication, attention to training and strategic allocation of resources. Cohesion—working collaboratively towards common goals in the context of shared values—is a common feature: this includes senior managers working together as a team, goals of the museum supported by staff, goals of departments cohesive and well integrated, staff encouraged to respect the skills and contribution of others, a high degree of commitment by staff along with a high sense of involvement, and so on. Whilst the responses to all these items from more effective museums differ significantly from those for less effective museums, the correlations between the questionnaire responses for those items and the assessments are not always statistically significant.

In the more effective museums, public programming emphasises strategic approaches to achieving positive outcomes for visitors including provision of a variety of learning strategies, ensuring that exhibits are in working order and attending to problems “on the floor”. The first of these strategies represents a recognition of constructivist approaches to learning, of the visiting experience as being much more than just inspection of the exhibits but rather an opportunity for a further elaboration of one’s understandings. It is important to note that the significant relationships between the assessments of effectiveness by experts is with marketing and public programming and not with research and collections. Not surprisingly, positive scores in assessments in the former two areas are correlated with better scores in the public program items in the questionnaire. Those museums that demonstrate leadership and cohesion also are those judged by both experts and staff to have effective public programs.

The effective management of change in museums is characterised by patient and considered leadership (Abraham *et al.*, 1999). In those which have managed change effectively—performance of the museum was judged by staff to have improved as a result of the change—leadership was able to translate external needs to internal vision and then to employee action, integrate tasks, structures, processes and systems at the technical, political and cultural levels, and integrate management practices to build internal and external unity. Time and resources were allocated to the change process. The change was clearly linked to the strategic issues facing the organisation; the nature of the future organisation and the advantages of the proposed changes were carefully communicated to key internal groups of staff. Museums associated closely with government are generally, but not uniformly, significantly less effective across many items from leadership to public programming: this we have ascribed to close and centralised control exerted by government, an emphasis on compliance and a focus on the financial bottom line (Griffin and Abraham, 1999). The processes adopted by government do not constitute best business practice. This project is the first to identify, by means of quantitative survey, the key characteristics which contribute to effectiveness of a group of like organisations in the nonprofit sector. Broadly there is agreement between the characteristics of effectiveness in museums and the features of effective commercial or forprofit organisations.

In this final paper we consider the results of factor analysis of questionnaire responses—a method of reducing sets of interrelated variables (items) to a few key factors—as well as qualitative data from questionnaire respondents and interviews with museum directors and other senior managers. Differences between museums in different countries, museums of different kinds, and differences in the perceptions of museum staff in different disciplines are also explored. We relate the results to those previously reported, especially so far as they concern the roles of leaders and managers, governments and boards, and the importance of public programs, particularly learning. We conclude with some commentary on broader implications for museum futures.

## **Background**

### *Museums as Organisations*

Museums and the behaviour of their staff and boards has been examined by a number of authors (Griffin 1987, 1988; Griffin, 1991a,b; Gurian 1995, 1999;

Janes 1997, 1999; Moore, 1999; Newlands, 1983; Strong, 1998; Weil 1994a,b, 1995). Many accounts of leadership and management in museums are anecdotal, but a few are analytical. Recent developments in museums in the United States of America have been considered by a number of commentators (in Graubard, 1999). Much media commentary on museums has focussed on change and funding problems as well as new approaches to public programming, but very little commentary attempts to analyse museums as organisations or deal seriously with issues of leadership and management. The role of managers and leaders is seldom examined in this context of change of funding, change of focus from collection and scholarship (internal or input oriented) to visitor, visitor experience and learning (external or output oriented).

### *Organisational Effectiveness*

Museums, like other effective organisations, should make a difference to the constituencies they serve and/or operate in. Such an approach to nonprofit organisational effectiveness is credited (by Weil, 1999) to J. Gregory Dees's "social enterprise" model of the 1990s and to the outcome-based evaluation developed and advocated by the United Way of America in its funding of health and human services agencies. Weil says:

[museums must] through demonstrable effective programs ... make a positive difference in the quality of individual and communal lives. Recast in marketing terms, the demand is that the American museum provide some verifiable added value to the lives of those it serves in exchange for their continued support.

Although commercial organisations can use some financial measure of effectiveness—Collins and Porras (1994), in their study which showed the important contribution that shared values make to success, used change in stock price over 50 to 150 years—there is still a question of the relationship between many of the financial measure(s) selected and the longer term performance of the firm.

Four features typify effective forprofit enterprises. First, they focus on vision and core values and build a culture to support these (Collins and Porras 1994, 1996). They are able to envision the future through knowledge of industry trends and relate the organisation's work to them (Hamel and Prahalad, 1994, p. 27). Second, they focus on people: recruiting new staff, career development, promotion from within and work force satisfaction (Fisher and Kahn, 1997; Pfeffer, 1994). High performance work practices also include contingent compensation, employee participation, higher wages and reduction of status differences (Pfeffer, 1996). Third, they focus on teamwork (Dunphy and Bryant, 1996; Guzzo and Dickerson, 1996) and fourth, they build a learning orientation (Kofman and Senge, 1995). Organisational culture is no less important to the effectiveness of nonprofits than it is in commercial organisations (Carl and Stokes, 1991 *et seq*; Krug, 1992; Herman *et al.*, 1994).

### *Leadership and Governance*

Despite some claims to the contrary, leadership significantly influences organisational performance. Leader differences account for performance variation *within* firms to a substantial degree (Thomas, 1988; Bass, 1990; Finkelstein and Hambrick, 1996). Effective leaders build "organisational capability":

a shared mindset concentrating on creating a capacity for change through understanding and managing organisation systems and empowering employees to think and act as leaders (Ulrich and Lake, 1991).

Transformational leadership influences followers by getting them to transcend their self-interests for the good of the group (Bass *et al.*, 1996, p. 10). Above all, leaders trust others (Kouzes and Posner, 1990). The principal effect of leaders is their influence on the “organisational climate” through the leadership styles they deploy: these styles derive from mature emotional intelligence (Goleman, 2000). Climate influences, significantly and positively, outcomes including financial performance. An authoritative style is especially positive but affiliative, coaching and democratic styles are also effective; coercive and pace-setting styles have a negative effect. More effective leaders deploy several different styles. A leader’s expectations are the key to a subordinate’s performance and development (Livingston, 1969). Prominent leaders of business have been quoted by some authors as focussing on developing people first. Bob Galvin of Motorola (in Hinterhuber, 1996) asserts:

We measure the effectiveness of the true leader, not in terms of the leadership he exercises, but in terms of the leadership he evokes ... but in terms of growth in competence, sense of responsibility, and in personal satisfactions among many participants. Under this kind of leadership it may not always be clear at any given moment just who is leading. Nor is this important. What is important is that others are learning to lead well.

Goran Lindahl, of Asea Brown Boveri (in Bartlett and Ghoshal, 1994), sees his most important role as coach and developer of his management team on which he spends 50% to 60% of his time: the empowerment of a manager is a gradual delegation process that requires substantial top-management involvement.

Museums, especially those part of government (in Australia, Canada and the United Kingdom), have been pressured to adopt those aspects of commercial practice (and labelled as “business practices”) which are claimed to lead to more efficient use of public funds. Working smarter has come to be no more than costing less, and in other words, more efficient! Effectiveness has thus been conflated with—subsumed by—efficiency. In any event, these are the views of boards and governments (Griffin, 1991a; Griffin and Abraham, 1999). Directors are as likely to be chosen for their fundraising skills—their diplomacy in courting benefactors—as for their prominence as scholars (Boyd, 1995; Nowlen, 1994); emphasis on the role of the director or CEO as coach and vision developer, as someone skilled in leadership and management, seems to be seldom favoured. The parody of the advertisement for the director of an art museum given by Goldberger (1994), at a time when there were many vacancies in American art museums, is surely well known:

Wanted: charming erudite executive with the diplomatic skills of a foreign service officer, the financial skills of an investment banker and the social skills of a 1950s wife. Position requires the academic background of a serious scholar, with the willingness to allow most of this to go unused in favour of poring over budgets and staffing issues. Long hours, low pay and the chance to see your name in the papers everytime you make even the slightest wrong move...

What is needed—it is said—is results, results in the moneyraising and cost cutting departments.

Boards are part of leadership and management notwithstanding their principal role in governance. Effective boards, according to Carver (1990) see that:

good governance calls for the board's role in long-range planning to consist chiefly in establishing the reason for planning [that] planning is done to increase the probability of getting somewhere from here [and recognise that] enunciation of that "somewhere" is the board's highest contribution. 'In a manner of speaking, boards participate most effectively in the planning process by standing just outside it... a model of governance is a framework within which to organize the thoughts, activities, structure, and relationships of governing boards.'

Effective boards recognise that both board and executive are essential to the proper functioning of an organisation, that they are equal and need to co-operate rather than waste time arguing about who is superior or who is responsible for policy (Drucker, 1990).

### *Museums and Public Programs: Education and Learning*

Museums are considered by many to be principally educational institutions as well as, or rather than, collecting institutions. If so, the nature of learning in such institutions must be understood. Roberts (1997, p. 132) says:

the essence of the education enterprise [in a museum] is the making of meaning. Whether it involves visitors interpreting their experience or museum personnel interpreting collections, meaning making is at the heart of the endeavours of both.

Hein and Alexander's (1998) review stresses that visitors' previous knowledge, attitudes and interests greatly influence their meaning making. Learning is an active process of experiences being incorporated into already held understandings. The 1990s saw a considerable increase in the debate about museums as places of learning (Durbin, 1996; Pitman, 1999; Roberts, 1997; Hein, 1998); many museums have deliberately devoted greater resources to visitor and audience research, especially in the USA and Australia.

Notwithstanding over 75 years of research undertaken on learning in museums (let alone the centuries of research on learning generally), there is still not in the wider community a clear shared view as to how people learn and consequently of how exhibits should be presented and interpreted. Often attempts by museums to appeal to a broader public are branded as 'dumbing down' or Disneyfication. Because attempts by museums to emphasise education in their interpretation and presentation of collections and exhibits seem not to have been as successful as hoped, there has been a tendency to emphasise entertainment as the experience which the visitor seeks and should get: the term edutainment has thus been coined. On the other hand, research on art displays and their interpretation at the Cleveland Art Institute (Schloder *et al.* (1994) and at the Denver Art Museum (Grinstead and Ritchie, 1990), for instance, revealed, amongst other things, that visitors both want their learning experiences to be directly related to the objects they see and have diverse learning styles, so a variety of interpretive strategies should be provided. Successful interpretation for the primary audience—the general public—means "accepting where they [the visitors] are"—keeping their backgrounds, preconceptions and values in mind and that, for instance, labels should be written for them.

Griffin and Symington (1997) and others have compared family and school group visits to museums. Jeffery-Clay (1998) points out:

museums are ideal constructivist learning environments. They allow visitors to move and explore freely, working at their own pace. They encourage group interaction and sharing. They allow personal experience with real objects. They provide a place for visitors to examine and expand their own understanding. As museum professionals it is our job to build and enhance these environments to pull the visitors into the experience, allowing them to explore in ways that pique their curiosity and encourage them to investigate and make comparisons to their own lives and experiences. Programs and exhibits must be carefully crafted and tested to assure that they enhance visitor knowledge and/or feelings without encouraging misconceptions.

Such a view sees the museum as a place of learning facilitation rather than expert knowledge.

## **Methods**

As previously explained (Griffin *et al.*, 1999), a total of 33 museums, selected to include art museums, science centres and aquaria, located in five countries were assessed through two independent instruments, the expert *assessment* and the *questionnaire*. 'Experts' in each of those countries were asked to assess the participating museums on a five point scale from 1 (=excellent in all respects) through 5 (=poor in most respects) with 3=good in many respects and 6=don't know or insufficient information available to make an assessment. Assessors were also asked to indicate which of four aspects of performance—(a) Public Programs including exhibitions and educational services/ programs, (b) breadth and depth of collections, (c) quality of research and scholarship, and (d) marketing and promotion—contributed positively to their assessment of each museum. A museum was not to be considered as excellent just because it was large, old or a 'National' institution. A total of 66 assessors provided 241 individual assessments. Most museums were assessed by more than six experts and many by more than 10.

A questionnaire (Appendix A) sought information from each respondent on six of their own demographics and on perceptions of the performance of eight areas of the respondent's museum: leadership, governance, purpose, structure, training, communication (common to most organisations) and information technology and public programs (as they are particular to museums). There was a summary section at the end. Each respondent was asked to indicate their level of agreement with the statements in the questionnaire again using a five point scale from 1 (=strongly agree) through 5 (=strongly disagree) with 3=neither agree nor disagree, and 6=don't know or sufficient information not available. The questionnaire was filled out by museum staff. The CEO of each museum was asked to distribute twenty-five questionnaires on a random basis in the ratio of 1 senior manager (CEO or person reporting directly to the CEO) to two middle managers (others with line responsibilities) to two operations staff. Confidentiality was guaranteed. A total of 594 responses to the questionnaire were received from the 33 museums.

Previous papers have reported the results of analyses of relationships between

expert assessments and scores for questionnaire items and differences between the averaged responses for the better (=higher rated or reputationally more effective) museums and the worse (lower rated or less effective) museums. In this paper the results of factor analysis of the questionnaire responses are reported; the analysis was carried out with the factors extracted by Principal Component analysis and using Oblimin rotation with Kaiser normalisation, which reduce the inter-related variables to a smaller number of underlying *factors*. Analysis of the data was principally at the organisational level, individual responses from each museum being averaged. To improve the robustness (reliability) of the data, a limited sample of 23 museums was selected by eliminating all those with less than three assessments and less than 12 responses to the questionnaire.

Qualitative analysis involved four questions in the questionnaire which asked for narrative comments. These questions were:

[Additional comments]: elaborate on [your answer to] any question

Major issues for the next three years: list three issues which you believe will face the organisation in the next three years: they may be the same issues addressed in the questionnaire or similar to them.

The future: list three areas in which you feel the organisation lacks sufficient knowledge and/or skills at present to deal effectively with future opportunities and problems

[Other issues]: comment on any issues whatsoever not raised

Responses were grouped into eight categories: change, cohesion, resources, sponsorship/fundraising, external factors (government, competition), local issues (the museum itself) and marketing. Qualitative analysis also involved interviews with directors and senior staff of the museums which participated in the project, while the quantitative information from the questionnaire responses has also allowed exploration of differences between countries, various types of museums and the discipline of the respondent: averaged responses at the institution level were compared in respect of the first two aspects and individual responses were averaged and compared in respect of the last.

## Results

### *General Comments*

We have arranged the results in relation to the two principal issues addressed by this paper: leadership and public programming. The results from factor analysis and qualitative considerations are placed within those main topics. Differences in respect of country, museum and discipline of respondent are then dealt with.

*Factor analysis* of the 23 selected museums for which there is robust data (three or more assessments and 12 or more responses) led to settling on a five factor solution: whilst total variance is explained by 22 factors, five factors together explain 71% of the variation and beyond that the nature of the factors becomes increasingly incoherent (Appendix B, Tables 1-6). Three of the five factors are significant: factor 1 concerning leadership, factor 2 concerning public

programming and factor 5 concerning governance (a leadership activity). The better 11 and worse 12 museums differ significantly from each other in respect of factors 1, 2 and 5 but not factors 3 or 4 (Table 5). The correlation coefficients between each of the five factors emerging from analysis of the 23 museums (Table 6) are not significant beyond the 0.05 level (although factors 1 and 4 and 5 are correlated with each other at the 0.1 level).

The third factor concerns Information Technology items only and accounts for slightly more than seven percent of the variation. The fourth factor, which accounts for just less than six percent of the variation, concerns public programming but emphasises participation: in the contribution of ideas for programs (item 58), in an understanding of the criteria for program choice (59) and in teamwork (items 31 and 57), while evaluation is an important positive element (item 56). Neither of these two factors correlates with expert assessments and neither distinguishes the better (those rated as more effective) from the worse museums. Accordingly they are not dealt with further here.

The contribution of collection strength (breadth/depth/age of collections) to the assessment is negatively correlated with factor 1 and with factor 5. The contribution of research and scholarship to the assessment is negatively correlated with factor 5. In other words, those museums and similar institutions with the better scores tend to be valued by assessors for their marketing and public programming strengths. Indeed traditional museums with substantial resources devoted to collections and scholarship tend to have poor factor scores. Charting the scores for factors 1 and 2 from the 5 factor solution for each museum reveals no coherent or distinct groupings; the same is true of attempts to group them by aggregated scores for the questionnaire items. Clearly features such as type of museum, country, size of museum and so on are not attributes shared by museums grouped by their effectiveness. (The issue of country and type of museum is dealt with below.) Factor analyses using the data from *all* museums produces factors similar to those for the 23 selected museums—leadership and public programming being the first two—although the relative prominence of items concerning leadership and cohesion changes and the individual items included vary somewhat. Analyses of individual responses (as opposed to averaged responses from each museum) produces similar factors also, again with variations in the individual items contributing to the factors.

In summary, the factor scales resulting from these analyses emphasise leadership, cohesion and public programming as characterising effectiveness, as do the analyses based on the items themselves reported earlier. Only the emphasis on cohesion and leadership is stronger: it is cohesive leadership which is important, leadership which encourages development of shared values, a commitment to agreed standards of quality and to effective communication, leadership which provides opportunities for training and rewards superior performance in terms of agreed and understood standards.

The results from *qualitative data* strongly support the conclusions that leadership and cohesion are the important elements of effective museums. The data is of two sorts (as explained above): narrative responses to the open-ended questions in the questionnaire and interviews with senior managers at many of the museums in the study. (It should be recalled that the study of the management of change also strongly supported the critical role of leadership and cohesion.) Respondents from lower rated museums generally have more comments than

respondents from the higher rated museums, especially concerning leadership and change and the effects of downsizing on services to the public. This is particularly so for general comments on any issue not raised in the questionnaire. When asked to consider major issues for the next three years, issues of change and cohesion emerged strongly. Marketing skills and knowledge (understanding and ability to reach diverse audiences, knowledge of visitors, ability to develop 'product', merchandising and fundraising/development) were highlighted as areas of knowledge and skills particularly important to the museum's future but often were ones in which the museum was noticeably deficient.

There are differences concerning country, museum-type and discipline of respondent.

### *1. Cohesive Leadership*

*1a, Factor Analysis* The first factor (Table 1), which we term *cohesive leadership*, explains just over 44 percent of the total variation: the leadership items included emphasise the long-term and vision (items 66 and 9) as well as supportive change management and modelling of appropriate behaviour (items 12 and 13). Quality issues (from the "Purposes" section of the questionnaire) are important (items 19, 24, 25, 26), as are integration of objectives (20 and 68) and understanding of and support for the goals of the museum (22 and 23). Training and development as well as attributes of the learning organisation are also evident (items 35, 36). Cohesion, including staff participation in decisions affecting them, is clearly an underlying theme of the factor evident in up to 10 items. Factor 5 (Table 3) comprises Board items only and accounts for just over five percent of the variation: involvement in fundraising (item 18) is the most prominent. Examination of correlations between each factor and demographic attributes of the museums (Table 6) shows significance for factor 1 with government connections—those with better scores are *not* associated with government—and age of respondent—the museums with better scores have *younger* staff. Not surprisingly, higher factor 1 scores are strongly correlated with positive scores for the individual items in the leadership section of the questionnaire. However, scores for factor 5 are not correlated with the average of items in the Board section of the questionnaire! (Good scores for the average of Board items correlate with good scores for factors 2 and 4.)

### *1b, Qualitative Evidence*

#### *Narrative Responses to the Questionnaire*

Responses to the narrative sections of the questionnaire overwhelmingly concerned leadership and training; purpose, structure and communication also received much comment. Two issues, change and cohesion, stand out. Comments elaborating responses to the questionnaire addressed leadership and board issues as well as communication. In responding to "issues not raised in the questionnaire", over 25% of responses dealt with change and cohesion. Change dominated the response to major issues for the next three years, 40% of responses concerning change, twice as many as dealt with resources including financial resources (for which one fifth came from three of the thirty museums).

When respondents were asked to identify areas in which sufficient knowledge and/or skills to deal effectively with future opportunities was lacking, over 25% addressed the ability to deal effectively with change and advancing of cohesion.

Overall, responses mentioned downsizing, the lack of a clear communication of vision and the holding of different perceptions of the vision by senior managers, and the lack of expertise in management as opposed to expertise in technical skills amongst senior managers. There was a range of other matters, including clinging to old hierarchies, managing in crisis mode, an emphasis on reactive rather than proactive practices, making decisions on limited information, lack of communication, people given little opportunity for creativity and responsibility, gruelling schedules and a lack of personnel resources, and domination by an accounting agenda. Attention was drawn to downsizing by attrition and a consequent lack of planning so as to control the outcomes of it such that the museum benefitted, the negative effect of downsizing on services to the public, on standards and on staff morale and the lack of adequate recompense for the additional demands placed on staff and on management to rebuild staff esteem and worth.

Examples of positive comments from the museums judged as more effective follow:

We have huge and difficult challenges in the next few years as we approach opening day. I feel like we are well supported by senior staff during this.

I don't think we are leaving any important area untouched... I understand though that in Human Resources, we will be working on developing an efficient and effective tracking program over the next couple of years to accommodate the increased staffing levels due to our planned expansion.

This organisation has just undergone a focussed attempt to identify strategic issues and opportunities. As a result, its vision, sense of direction and team spirit has improved and sharpened. In addition, recognition by management that some changes were needed in the decision-making process has led to some easing of bureaucratic restrictions and expectations of further improvements.

However, there are some negative comments from the more effective museums:

Senior managers need to release more responsibility to middle managers. Micro management does not work; numerous meetings take place in order to have "team" involvement... people [become] frustrated. Skills can be learned with experience. Too many team meetings leave too little time to do the necessary work.

Our organisation has always been committed to new technology and educating the public. However, in meeting and exceeding the usual goals of opening and operating the [museum we] have missed great opportunities to be a ground beating organisation from within the institution. Issues such as employee provided day-case, sick leave time banks and job sharing have been overlooked.... Many have told us the [museum] is 'the best in the world'...we have not used our vast financial and supportive resources to be the 'best' organisation 'to work for' in the world!

Our Board is comprised of many members, most of which the typical [museum's] team members are never informed of. Outcomes of Board meetings are not common knowledge. The interaction between the Board and senior management is not readily shared.

Individuals are hired on their strengths regarding a certain position and then feel inadequate when expected to take on additional roles to be a part of the 'team' giving individuals the opportunity to expand their knowledge in a more comfortable way would produce better overall results.

Comments by staff in the less effective museums provide a contrast with these:

Current vision document is being interpreted by individuals, department, and division [in] totally different [ways]... the institution still lacks a clear vision and a clear set of priorities... we manage in a crisis mode and make too many decisions that are short term or avoid make those tough calls....

Scheduling is so gruelling, personnel resources are so modest, and funds are so tight that it is difficult to carve out 'reflective' time to effectively work on critical documents, such as long-range strategic planning; staff 'retreats', for all their shortcomings, have not been utilised enough or effectively to gain true consensus on long-range institutional goals. From a management standpoint, I think the museum's greatest challenge over the next few years will be to increase the active participation of the board.

One of the difficulties will be trying to serve the needs for many different client groups both internal and external... [this aim is] being challenged by our many different users (cultural groups, donors, sponsors, researchers, general public, etc), while our resources are shrinking.

I feel that the institution has great difficulty in trying to get the staff to work towards a shared vision and purpose. The communication is very poor ... It is also very formal. Most (not all) senior managers are never seen by most staff. When communication does happen, it is usually top down... Management [is] more comfortable with command and control model than one more adapted to teamwork;

We do not have any proper staff training or staff development. We are lacking a staff orientation program, computer skills are all over the place, no customer service training for internal or external customers, training is also required for working within a team environment. Managers need proper training.. We also need to develop standards

We really need a commitment to the staff. So that they are also treated as a resource not a liability.

*Interviews* One of the comments made to one of us (DJGG) on the first visit to the Monterey Bay Aquarium, south of San Francisco, was that when staff make a mistake, they aren't criticised, they are asked what they have learned from the event; this was confirmed on a subsequent visit. When the Aquarium was being planned the staff were sent to other aquaria to find out what they were like so as to help them plan their own. (This contrasts with some museums undergoing building development where Board members are sent to visit other museums: they return to give their views seemingly knowing more than the staff who are expected to plan and run the new museum.)

At COSI, a science centre in Columbus, Ohio (with branches elsewhere in that State), a wide variety of approaches were used by former President Roy Shafer to achieve a common vision. All staff wore the same T-shirt when in the building, an event—'First Thursday'—was held each month after work at which

staff of the host department explained their functions and activities and role-played various activities. Senior management referred to themselves as the 'support team' and attended project teams as a 'coach'. Shafer explains:

The question is how do we get individuals across an organisation to make the same kind of decision when faced with the same dilemma? How do we assure that hundreds of people faced with thousands of transactions every day, will all make the same decision, on behalf of the organisation? Because that is what we are asking them to do. We can't give them a book to find out the information.

Referring to Collins and Porras' study, Shafer continued:

The only answer they would contend, and I would agree, is values. We have to help them learn how to decide, not what to decide. We spent probably a third of our time reinforcing core values. Through every mechanism we could dream of. From performance bonuses to performance planning to first Thursdays... The organisation in essence that sets the standards... But if the organisation doesn't adopt those standards, as a basis for performance, the CEO can't make those stick. What the CEO does today has no impact on people's experience today. It has impact on their experience six months from now, or six years from now, but not today... We were organised in floor teams with direct delivery across divisions... The leadership team is called the support team, not the management team. Everybody is a manager. My job in a leadership role is to support the good work of the team members.

Typically what we would do is try to give an opportunity for change to meet the standard, over a reasonable period of time. When the change didn't occur then we would change players. People should never, unless they have worked effectively to avoid feedback, they should never be surprised at their performance review. That should never be a moment of surprise. They can deny it, but it shouldn't be a moment of surprise. We had to apply an enormous amount of energy every day. You could never let up, not for a moment. In fact, I don't think that I've really understood just how draining that was and the energy volume it required until I stopped doing it.

Responses in discussions with senior managers from COSI and the Monterey Bay Aquarium were remarkably similar: in both senior managers irrespective of their area of responsibility were able to talk authoritatively on program issues and spoke very positively about their colleagues and about training and development matters. At COSI senior managers frequently talked of the positive contribution of staff on the various project teams.

The Royal British Columbia Museum in Victoria, British Columbia (Canada), a mixed museum comprising natural history, history and anthropology collections and exhibits, is funded principally by the provincial government. In 1992 it commenced a series of important changes following dramatic reorganisation in 1985–86 which had involved declaring all positions vacant and rehiring staff, a "scaring" process (Barkley in Janes 1997). The 1992 changes focussed on what the museum was doing and for whom, what the public thought of the museum's activities; it did not focus on restructuring or downsizing! Extensive consultation with staff and volunteers was followed by consultations with community groups, special interest groups and the general public. Staff groups were established to deal with functional areas from research and collections to public programs and operations. Barkley reports:

Museums must be seen by the public to add value to their lives and to the life of the community... We are storehouses of information, not just curious objects... We can help build bridges of understanding between people of various races, religions, interests and backgrounds...

As changes developed and new ways of operating were put in place, the opportunity was frequently taken to celebrate success; but the opportunity to celebrate failure was also taken (Barkley, pers. comm. 1999).

Teamwork, the training of staff to work in teams and induction of new staff are significant features of the best organisations. At The Natural History Museum (London) a new induction program was introduced by Director Neil Chalmers soon after his arrival in 1989. Chalmers explains:

we now have a two day induction course which we manage very carefully and it is mostly for the new recruits and this is followed by a four and a half day back up course and... we hope to give them that within the first four months after they have arrived.

Science North, a science centre in Sudbury, Ontario, Canada, recognised for innovation in its public programming, when faced with likely reductions in funding around the time of its move to greater involvement with government in the early 1990s, sought the views of staff on ways in which funds might be reduced. The result was savings in several areas and a small salary rise for staff. (The staff of Provincial government organisations concurrently received no salary rises and in addition were required to pay a social dividend—work for a short time without pay).

The way the board works with senior management also distinguishes the best museums, according to the questionnaire responses. The interviews and narrative responses to the questionnaires again support this. The chair of the board at one of the best museums asserted that there should be no more than six meetings a year:

if there are any more, staff get involved in demonstrations of their work; that's what happens over at [another place].

At one of the lower rated museums the board (in the mid 1990s) had developed no shared view of the museum's purpose. This was not surprising considering that it comprised members from two different authorities and none of the Board took any part in fundraising or generating support from government agencies. In another museum, the board took over development of the mission and vision statement, completed the process behind closed doors and delivered the statements to senior management. The result was a staff united as never before, against the board. In many museums, boards can nevertheless be involved in similar activities, in focussing their efforts on aspects of the financial situation in which they believe they are expert, such as merchandising, or on marketing because they believe they know about it.

## 2. Visitor-focussed Public Programming

*2a, Factor Analysis* Factor 2 (Table 2) explains eight percent of variation and comprises items relating to concern for the visitor, ensuring that exhibits work (items 52 and 51), awareness of differing learning styles of visitors—providing a variety of interpretative strategies (53) and attention to the resources allocated to advertising (60). Three items from outside the Public Program section are included: they concern rewards (item 40), communication (item 43) and induction of new staff (38). Factor 2 is significantly correlated with overall expert assessment and with the positive contribution of public programming and of marketing to the assessment. As with factor 1, those museums with better factor 2 scores tend to be not associated with government and have younger staff. There are suggestions in the data that greater rates of change have reduced the level of teamwork and participation in public program development and that recent physical development—e.g. a new building—stimulates public programming. Positive scores for the individual items in the public program section of the questionnaire are correlated with higher factor 2 scores (and with factor 4 scores also).

### *2b, Qualitative Results*

#### *Narrative Responses to the Questionnaire*

Few of the responses dealt with public programming, but a positive comment from one of the more effective museums may be quoted:

I do not feel the organisation lacks sufficient knowledge. I do feel we need to provide our visitors with an exclusive experience. Our centres must provide many positive and fun learning experiences of families and our overall audience will find other avenues for learning/entertainment.

*Interviews* At Monterey Bay Aquarium, Executive Director Julie Packard concerns herself with 'image': image includes even the text interpretation for exhibits (which are widely regarded as amongst the best in the world). Her involvement with the budget process, on the other hand, is confined to discussing the gap between revenue and expenditure, before senior managers consider the details, and discussing the outcome of those discussions. The significance is that at Monterey Bay Aquarium, it is the visitor who is receiving the principal focus of the CEO, not the money. Furthermore, one of the things that newly appointed Director Neil Chalmers did at The Natural History Museum (London) shortly after he started was to take all senior managers to Disneyland to learn the essence of customer service. Customer service training is now given to all staff as part of their induction program. (The Disneyland visit led some academic critics to fear that the Museum's exhibitions were going to take on the features of Disneyland exhibitions, though Disneyland happens to be known worldwide for the excellence of its concern for its 'guests'!)

In the less effective museums, conflicts are not uncommon, frequently over the relative authority of staff members in project teams concerned with exhibitions. In one, various approaches to exhibition development—seen as advances by some—have been discarded eventually following opposition by one of the more powerful groups. Other groups sought to exercise power through

the way they requested information and set standards. One commentator explained.

[as] the new exhibit professionals became more and more professionalised they took on another museum culture where their goals became not to serve the public but to arrange matters for their own convenience, their own way of life and to serve certain professional goals as opposed to public goals. My favourite example is exhibit labels. The designers didn't like the look of them so they make them as small as possible. And another thing is reduce the contrast: black on white is ugly so they want to have a tone on top, then... cutting the label size so that you can hardly read it. If you walk through this place you will see loads of exhibit labels that you cannot read.

### *3. The Influence of Country, Museum-type and Discipline*

When museums of different kinds and in different countries are compared some important differences emerge, particularly distinguishing science museums and science centres, natural history museums and art museums, while there also seem to be differences in the perceptions of different groups of staff (Appendix C). There are numerous significant differences between the museums of different countries. In particular, US museums score more positively in areas of leadership, governance and public programming. Overall distinctions between the museums of different countries concern appropriate modelling behaviour by senior managers, regular performance assessment and information transfer. However, country is not a principal explanation for the major distinctions of the more effective museums. Although many of the museums in this study are mixed, it would appear that science museums and science centres have more effective governance than other types of museum, and art museums less effective governance. Science museum staff give more positive responses to questions concerning public programming than do staff from other areas; this is particularly so in relation to a focus on the visitor. Finally, there are a number of significant differences in the responses of people from different discipline areas/job classifications which are evident when individual responses are analysed. These especially concern four groups: curatorial/ conservation, education and exhibitions, finance and human resources (HR) and Public Relations respondents. Curatorial and collection management staff are less positive about the museum than are other staff; the same is true of education/exhibitions staff.

### **Discussion and Conclusions from this Study**

Every approach to analysis of the results of this study, whether quantitative or qualitative, shows that leadership and cohesion are the critical factors for the successful museum. The characteristics of effective museums are those which align with the features of discipline (alignment of initiatives with the organisation's overall direction), stretch (stimulation of people to achieve of their best), trust and support (including openness of managers to questioning) which have been identified by the work of Bartlett and Ghoshal (Bartlett and Ghoshal, 1994; Ghoshal and Bartlett, 1997). More than that, the factor analysis reported here emphasises that it is not simply leadership which is important, it is cohesive leadership which gives support to, and encourages involvement of, staff in mat-

ters which directly affect them including training and development. This is important; as well as a focus on quality and on organisational learning. On the other hand, in the less effective museums there is profound concern over the way in which those with the responsibility to make decisions about the organisation behave, alarm about future resources and uncertainty about the future in general; conflict is evident. The deep feelings voiced about ineffective management of change in some museums clearly illustrates this. The cluster of features characterising cohesive leadership resembles the leadership styles which contribute to an effective organisational climate (Goleman, 2000). These include setting a clear long-term vision for the organisation, modelling of appropriate behaviours and giving support to staff. Unfortunately though, much of the managerialist approach adopted by some governments and boards of museums in pursuit of 'results' has led to the deployment of coercive and pace-setting styles which leave little room for individual initiative and increase stress levels amongst staff.

Leadership, training and communication are issues of importance in distinguishing the museums of different countries: it would be appropriate for those responsible for museums in Australia, Canada and the United Kingdom to carefully note the performance of US museums in these important areas. Organisational reform emphasises leadership as building shared values: that is one of the conclusions of this project. Cohesion is advanced when the values of the organisation match the values of the people in it (Newlands, 1983); the matching of staff to structure, goals and organisational climate is more important than formal management systems such as written goals, objectives, policies and procedures. A convergence of people, power and structure to focus on specific tasks objectives giving play to sensitivity, creativity and independence of thought and relying on expert power rather than personal power or authority—is the climate Newlands considers to be the desirable one for museums. In many museums, especially traditional ones, it is difficult to develop such an approach because the values of certain professional groups are not shared by other groups. They are a professional bureaucracy (Griffin, 1987; Mintzberg, 1983), having considerable control over their own work, seeking control over the work of others and thus difficult for management to control. In Mant's (1994) terms the professionals are often more binary—competitive—whilst others are ternary, relationships being seen in a context of co-operation to achieve shared goals. This is particularly so in respect of public programs, especially exhibitions. Research/curatorial staff may believe that truth exists and only has to be discovered, whilst public program staff may believe knowledge exists in the individual and varies from person to person (Hein, 1998).

Ames (2000) observes:

Museums are complex social organisations composed of intertwined layers of routines, obligations, schedules and competing interests that frequently inhibit prompt or consistent responses to new initiatives. In addition, archaeologists, anthropologists and art historians working in museums maintain allegiances to the traditions of their own professions, sometimes even at the expense of the interests of the institutions which employ them.

The conflict and disagreements about public programs have been dealt with by McLean (1999, p. 89):

Traditionally, most museum exhibitions have been a one-way conversation... Curators assembled the objects, established the conceptual framework, and wrote the exhibition 'statement' and labels. Designers then packaged the curatorial material ... Afterwards educators prepared interpretive materials... While this process ensured that the depth of curator's passion and knowledge made it out into the galleries, it was fraught with problems, particularly when the curator's true affections were aimed at other scholars, leaving a majority of visitors in the dark.

The results of the analysis of perceptions of staff from different disciplines lends quantitative support to these assertions: differences most frequently concern public programs. These same issues are those which appear to distinguish museums of different kinds. It would appear that in science centres and science museums there are fewer differences between staff in their perceptions so making for greater levels of cohesion. (There are also strong suggestions in the data that science centres/museums receive more positive assessments; and thus greater cohesion does indeed lead to greater effectiveness.) Clearly also the effective museum pays strategic attention to visitors and doing so is significant in the minds of assessors. The same three items of the Public Program section of the questionnaire which are included amongst the 28 items distinguishing the most effective museums are also included in factor 2 in the five factor solution. Those three items are also in fact reported as being amongst the 10 best (i.e. lowest scoring) items in museums generally (Griffin *et al.*, 1999, p. 49); item 54 indicating that "educational offerings attempt to address the full range of knowledge, attitudes and understandings that visitors bring with them" is also amongst the 10 best items.

In museums generally, we can conclude, the increasing understanding of the nature of learning and meaning-making has placed the visitor at the centre of the visiting experience: the museum provides many opportunities to arrive at interpretations of their world without compromising integrity (Jeffery-Clay, 1998). Such approaches recognise that learning is an experience which is more effective if it is enjoyable. Griffin and Symington (1997) point out, as have others, that whilst families visiting museums characteristically determine for themselves which exhibits they visit, how long they spend looking at them and talking amongst themselves, many school group visits lack those features. If school groups were to be allowed to plan their visit and control it they would then assert they were both enjoying themselves and learning. These attributes accord with the important recent findings about learning in informal settings (Durbin, 1996; Falk and Dierking 1992, 2000; Hein, 1998; Hein and Alexander, 1998; Roberts, 1997 and Pitman, 1999).

### **Consequences for Museum Futures**

A museum is an organisation of people, not primarily an entity concerned with caring for and displaying collections, notwithstanding the importance of those functions (Griffin 1987, 1988, 1991b).

Better museums give attention to values and to the development of a shared culture including views about why the particular museum exists and where it

is going. Successful organisational reform generally emphasises transformational leadership, attention to communication about the nature of the changed organisation, and the shaping of its culture and climate, *not* to cost-cutting, downsizing or restructuring. Our study demonstrates the truth of this in museums and like organisations. Effective boards contribute to the goals rather than intervene in executive management issues. In particular they see that change is managed so as to enhance the organisation's effectiveness rather than strengthen the power of certain managers. These issues are far more important than matters such as structure—organisational design—which receives such a lot of attention in some places.

Measuring or assessing a museum's merits must focus on how to develop the critical values which distinguish museums from other public institutions and constitute the basis of the very way in which they contribute to the community and to society, even to the uplifting of the human spirit. It is these very things which too many governments and boards have forgotten in the rush for financial resources which no longer seem to be coming from an increasingly affluent society in the free markets of the 'globalized' world.

New thinking is required of many governments and boards in respect of how their museums, like other organisations, are to work effectively and exploit the opportunities of the future. A greater focus is needed on what actually leads to effectiveness in the long-term. Establishing agreed statements of vision, mission and assessment of performance, seeing that strategic thinking as well as planning takes place, and genuinely encouraging creativity and risk taking are positive. Individual and short-term contracts, a focus on the financial bottom line, restructuring and downsizing, however, make no contribution to success. Neither does frequent intervention in process by board or government.

Much more care is needed in choosing people for leadership positions (Fernandez-Araoz, 1999; Bennis and O'Toole, 2000): because leadership is as important in museums as in all other organisations. Boards and others need to agree on what leadership is and how to recognise and support it. For their part, staffs of museums can come to realise that museums can be managed as are other organisations but that this does not mean the adoption of managerialist practices and its negative effects in all domains. Genuine leadership and management can be a contribution to achieving everyone's goals for the museum. Equitable employment means people at all levels being able to pursue the tasks and objectives for which they were hired and developing and expanding those. It also means the right to be respected for genuine contribution rather than being discriminated against on the basis of one's role. In short, good museums, like good arts organisations, have lessons for commercial organisations, just as the latter have lessons for others.

Most particularly, the future of museums must be pursued in the context of making a difference to people's lives, not merely for the purposes of ensuring the survival of the museum with its traditional activities and behaviours (Weil 1994a,b, 1999). The indicators and markers used to assess success must reflect that. Appointing directors principally for their fundraising and public relations skills ignores the fundamental role of cohesive leadership which only the chief executive can play. Boards and governments alike must be as prepared to undergo assessment of their performance and their contribution as much as they

expect the management and staffs of the museums for which they are responsible.

The items and factors which emerge from this study as characterising effectiveness are practices and processes. Like leading indicators in economic forecasting they are not aims in themselves! But if museums are positive in these attributes it is highly likely that they will succeed over the long term because of their ability to learn from the past and the 'industry', foster and exploit creativity whilst always co-operatively focussing on why the organisation is there and what it is supposed to be doing for whom. Encouraging such practices and processes is the principal role of leaders and senior managers as Collins and Porras (1994, 1996), Hamel and Prahalad (1994), Bartlett and Ghoshal (1994) and Ghoshal and Bartlett (1994, 1997) have shown. It is a matter of how people work together and how decisions are reached (Hout and Carter, 1995). Boards and governments have a responsibility to recognise that and media commentators would do well to do so as well. So would all working in and associated with museums.

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### **Appendix A List of Statements in 75-item Questionnaire**

Questions 1 through 7 sought demographic information which is not dealt with further here.

**LEADERSHIP**

- 8 Senior managers have championed a vision for the organisation
- 9 Senior managers are concerned mainly with long-term, strategic issues
- 10 The CEO spends substantial time seeking support from outside the organisation in order to improve this organisation's standing
- 11 Senior managers work together effectively as a team to achieve the goals of the organisation
- 12 Senior managers give time and support to those staff who have trouble adapting to the new ways of doing things
- 13 Senior managers model appropriate behaviour for the rest of the organisation

**BOARD**

- 14 New members of the governing Board are chosen in consultation with the Chair of the Board and the CEO
- 15 Knowledge and skills in industry practice and standards are important criteria for choosing members of the Board
- 16 The Board concerns itself mainly with the long term vision of the organisation
- 17 There is substantial and visible trust between the Board and the CEO
- 18 Members of the Board contribute actively to fundraising

**PURPOSE**

- 19 Goals and objectives are devised to ensure that those who should benefit from the organisation's activities are satisfied with what we produce
- 20 Objectives for divisions/departments/sections clearly integrate with those for the organisation as a whole
- 21 Allocation of resources to projects is based on a careful assessment of the value of the outcomes to the future of the organisation
- 22 Goals and objectives for the organisation are understood by staff
- 23 The organisation's goals and objectives are supported by staff
- 24 Staff are expected to understand/recognise the appropriate quality standards to be achieved in their work
- 25 There is encouragement in goal setting to pay attention to the quality of the process as well as to quantifiable outcomes
- 26 We aim to ensure that completed projects meet the required standards first time

**STRUCTURE**

- 27 Some of the tasks now undertaken by the organisation should be outsourced to some other agency or company
- 28 People at all levels are encouraged to take responsibility for the decisions they make
- 29 Senior managers refrain from making decisions which should and can be made at lower administrative levels
- 30 Staff are able to go to people in other sections to get help in fixing problems affecting their work without having to go first to a supervisor or manager for permission
- 31 Many of the activities and projects in the organisation are carried out by teams

- 32 Staff are encouraged to develop respect for the skills and contribution of others in the organisation
- 33 There are well-developed opportunities for management and staff to work in a variety of different jobs
- 34 Decisions that affect me and my work are discussed fully with me by my supervisor

#### TRAINING

- 35 There are genuine opportunities for staff to improve their skills and knowledge
- 36 Staff to receive training/development are involved in formulating the nature of the training/development program/priorities
- 37 There are adequate and clear procedures in place for hiring appropriately qualified/skilled new staff
- 38 There is an established system for induction of all new employees
- 39 Performance of staff is assessed at regular intervals
- 40 Rewards are based on contribution to pre-established and known standards rather than vague opinions on the worth of individual effort
- 41 Staff have been trained to operate effectively in teams

#### COMMUNICATION

- 42 Information is transferred quickly and efficiently through the organisation to all those who need to know
- 43 Staff take an active interest in the information that is communicated to them
- 44 We have learned a great deal from past experiences and practices in this organisation
- 45 We are very interested in learning from what other organisations do well
- 46 Senior managers are interested in new ideas and are keen on trying them out in this organisation
- 47 Problems are carefully explored and their nature agreed on before solutions are developed and applied
- 48 Most people in different sections try to work on new ways of doing things rather than being stuck in fixed patterns
- 49 We systematically review projects, programs and practices in this organisation

#### PUBLIC PROGRAMS

- 50 Senior managers show their active interest in visitors and public programs by their frequent presence on the floor of public galleries
- 51 Problems experienced by visitors with public programs are speedily and appropriately attended to by staff of the relevant section
- 52 There is a clear commitment by relevant staff to ensuring that exhibits are in working order at all times
- 53 Visitors are provided with a variety of ways (interpretive strategies) in which to understand the meaning of the exhibits/programs
- 54 Educational offerings attempt to address the full range of knowledge, attitudes and understandings which visitors bring with them
- 55 Marketing staff use the results of market research to help program staff develop effective programs

- 56 The staff/consultants who undertake evaluation of public programs co-operate to improve program effectiveness by contributing the results of their work to decisions about programs
- 57 Exhibits and other public programs are developed by education, exhibition and other staff as well as research and curatorial staff working together
- 58 Ideas for public programs are contributed by staff from throughout the organisation
- 59 All those involved in public programs clearly understand the criteria for program choice
- 60 The amount of money allocated to advertising and promoting public programs is based on knowledge of what expenditure is required to reach the desired proportion of the target market
- 61 Staff responsible for conservation of collections work to ensure that wherever possible the objects will be available for use in public programs and scholarship
- 62 Public program staff are accepted by others including research and curatorial staff as important contributors to the future of the organisation

#### INFORMATION TECHNOLOGY

- 63 Appropriate resources are allocated to the continual improvement of information technology
- 64 Management of the collections makes maximum use of information technology to improve access by the public and other interested parties to knowledge of the collections
- 65 The development of the use of information technology is being done in the context of an overall policy which focuses on how the organisation may benefit in meeting its service to the public

#### SUMMARY

- 66 The CEO and senior management group set a clear vision with long planning horizons (LEADERSHIP)
- 67 Board members actively use their knowledge, skills and commitment to further the organisation's mission (BOARD)
- 68 The goals and objectives of various departments/sections are cohesive and well integrated with those of the organisation as a whole (PURPOSE)
- 69 Structure is flexible, responsive and shows co-operation between its parts (STRUCTURE)
- 70 High degree of commitment, resources, and planning (TRAINING)
- 71 Good work is recognised and equitably rewarded (TRAINING)
- 72 High sense of awareness, involvement and feeling part of the team (COMMUNICATION)
- 73 A learning orientation is encouraged (COMMUNICATION)
- 74 Public program development and marketing are clearly focussed on visitors as important stakeholders (PUBLIC PROGRAMS)
- 75 Technology is up to date with market development and usage is widespread (INFORMATION TECHNOLOGY)

## Appendix B Factor Scales

Table 1. Five factor solution for 23 selected museums, all items included. Factor 1, Cohesive LEADership. Composition of the factor together with factor loading. Items in **bold** are among those significantly distinguishing the better (higher rated) museums at the 0.1 level or above

QN	SECTION	DETAIL	LOADING
66	<b>LEADERSHIP</b>	<b>The CEO and senior management group set a clear vision with long planning horizons</b>	0.865
26	PURPOSES	We aim to ensure that completed projects meet the required standards first time	0.847
9	<b>LEADERSHIP</b>	<b>Senior managers are concerned mainly with long-term, strategic issues</b>	0.836
70	<b>TRAINING</b>	<b>High degree of commitment, resources, and planning</b>	0.826
25	<b>PURPOSES</b>	<b>There is encouragement in goal setting to pay attention to the quality of the process as well as to quantifiable outcomes</b>	0.816
35	TRAINING	There are genuine opportunities for staff to improve their skills and knowledge	0.816
32	<b>STRUCTURE</b>	<b>Staff are encouraged to develop respect for the skills and contribution of others in the organisation</b>	0.802
20	<b>PURPOSES</b>	<b>Objectives for divisions/departments/sections clearly integrate with those for the organisation as a whole</b>	0.767
28	STRUCTURE	People at all levels are encouraged to take responsibility for the decisions they make	0.748
8	<b>LEADERSHIP</b>	<b>Senior managers have championed a vision for the organisation</b>	0.744
68	<b>PURPOSE</b>	<b>The goals and objectives of various departments/sections are cohesive and well integrated with those of the organisation as a whole</b>	0.741
36	TRAINING	Staff to receive training/development are involved in formulating the nature of the training/development program/priorities	0.707

Table 1. - Continued

QN	SECTION	DETAIL	LOADING
13	LEADERSHIP	<b>Senior managers model appropriate behaviour for the rest of the organisation</b>	0.707
22	PURPOSES	<b>Goals and objectives for the organisation are understood by staff</b>	0.695
12	LEADERSHIP	Senior managers give time and support to those staff who have trouble adapting to the new ways of doing things	0.693
19	PURPOSES	<b>Goals and objectives are devised to ensure that those who should benefit from the organisation's activities are satisfied with what we produce</b>	0.691
10	LEADERSHIP	<b>The CEO spends substantial time seeking support from outside the organisation in order to improve this organisation's standing</b>	0.686
24	PURPOSES	Staff are expected to understand/recognise the appropriate quality standards to be achieved in their work	0.678
23	PURPOSES	<b>The organisation's goals and objectives are supported by staff</b>	0.662
44	COMMUNICATION	<b>We have learned a great deal from past experiences and practices in this organisation</b>	0.660
72	COMMUNICATION	<b>High sense of awareness, involvement and feeling part of the team</b>	0.659
69	STRUCTURE	<b>Structure is flexible, responsive and shows co-operation between its parts</b>	0.644

Table 2. Five factor solution for 23 selected museums, all items included. Factor 2, Visitor-focussed Public Programming. Composition of the factor together with factor loadings. All the items are among those significantly distinguishing the better (higher rated) museums at the 0.1 level or above

QN	SECTION	DETAIL	FACTOR LOADING
52	PUBLIC PROGRAMS	There is a clear commitment by relevant staff to ensuring that exhibits are in working order at all times	0.795
51	PUBLIC PROGRAMS	Problems experienced by visitors with public programs are speedily and appropriately attended to by staff of the relevant section	0.772
53	PUBLIC PROGRAMS	Visitors are provided with a variety of ways (interpretive strategies) in which to understand the meaning of the exhibits/programs	0.740
40	TRAINING	Rewards are based on contribution to pre-established and known standards rather than vague opinions on the worth of individual effort	0.739
43	COMMUNICATION	Staff take an active interest in the information that is communicated to them	0.646
38	TRAINING	There is an established system for induction of all new employees	0.601
60	PUBLIC PROGRAMS	The amount of money allocated to advertising and promoting public programs is based on knowledge of what expenditure is required to reach the desired proportion of the target market	0.550

Table 3. Five factor solution for 23 selected museums, all items included. Factor 5, Supportive Board. Composition of the factor together with factor loadings. Items in **bold** are among those significantly distinguishing the better (higher rated) museums at the 0.1 level or above

QN	SECTION	DETAIL	FACTOR LOADING
<b>18</b>	<b>THE BOARD</b>	<b>Members of the Board contribute actively to fundraising</b>	-0.861
14	THE BOARD	New members of the governing Board are chosen in consultation with the Chair of the Board and the CEO	-0.859
<b>15</b>	<b>THE BOARD</b>	<b>Knowledge and skills in industry practice and standards are important criteria for choosing members of the Board</b>	-0.724
67	THE BOARD	<b>Board members actively use their knowledge, skills and commitment to further the organisation's mission</b>	-0.684
27	STRUCTURE	<b>Some of the tasks now undertaken by the organisation should be outsourced to some other agency or company</b>	0.571

Table 4. Total variance explained by factors in the factor analysis for 23 selected museums. Five factors explain 71 percent of the variation

FACTOR	TOTAL CONTRIB	PERCENT OF VARIANCE	CUMULATIVE PERCENT	ROTATION TOTAL
1	29.930	44.014	44.014	25.476
2	5.543	8.019	52.033	8.868
3	5.067	7.451	59.484	7.193
4	3.960	5.824	65.308	12.668
5	3.588	5.276	70.584	10.898

Table 5. Factor analysis—means (AVGE) and standard errors (ST ERR)—for better 11 and 12 worse museums together with correlation coefficients (r) with expert assessment for three factors emerging from the five factor solution for the 23 selected museums. P(t) is the probability of the two means (AVGE) being the same. The direction of the correlation between assessment and factor score has been varied so that positive score means positive correlation<sup>a</sup>

FACTOR	DESCRIPTOR	BEST AVGE	ST-ERR	WORST AVGE	ST-ERR	P(t)	ASSESS
1	Cohesive Leadership	0.4247	0.2788	-0.3893	0.2704	0.0484	0.1477
2	Public Programming	0.5181	0.1883	-0.4749	0.3070	0.0130	0.4636*
5	Active Board	-0.4878	0.2713	0.4471	0.2595	0.0212	0.3734*

<sup>a</sup>\*significant at the 0.05 level.

Table 6. Correlations between factors for the 5 factor solution for 23 selected museums and expert assessments of the museums. Factor 2 is significantly correlated with expert assessment and with the influence of public programs (PUB PROG) and marketing (MARK) on the assessment score (ASSES) but not research (RES) or collections (COLL). The direction of the correlation between assessment and factor score has been varied so that positive score means positive correlation<sup>a</sup>

FCTR	FAC 2	FAC 3	FAC 4	FAC 5	ASSES	PUB PROG	COLL	RES	MARK
1	0.186	0.191	-0.337	-0.335	0.148	0.041	-0.504*	-0.254	0.146
2	1	0.083	-0.142	-0.112	0.464*	0.460*	-0.225	-0.247	0.571**
3		1	-0.130	-0.042	-0.173	-0.048	0.010	-0.329	-0.054
4			1	0.135	0.005	0.109	0.207	0.216	-0.085
5				1	-0.373*	-0.034	0.377*	0.435*	-0.232

<sup>a</sup>\*significant at the 0.05 level; \*\* significant at the 0.01 level.

Table 7. Correlations between factors for the 5 factor solution for 23 selected museums and demographic attributes of the museums. Government (GOVT) has a negative impact on factors 1 and 2. Museums with high scores in factor 1 have younger staff. (Change is an rough aggregate of incidents (high score denotes greater change), "LastDev" is a score for the time of last major physical development of the museum (low score is most recent), "Res" is a score for the relative importance of research in the museum's activities (high score means more), "Size" is a numerical representation of the number of staff in the museum (high score means more staff), "Perm" is the indicator of the number of respondents permanently employed (high score is higher number), "Age" is age of respondent (low score denotes youth). The direction of the correlations between demographic attributes and the scores for factors 4 and 5 have been varied so that positive score means positive correlation<sup>a</sup>

FACTOR	GOVT	Change	LastDev	Res	Size	Perm	Age
1	-0.394*	0.293	0.060	-0.264	-0.368	-0.267	-0.482**
2	-0.306	0.185	0.522**	-0.325	0.418*	-0.186	-0.295
3	0.087	0.183	0.048	-0.060	-0.280	-0.510**	-0.120
4	-0.221	0.409*	0.232	-0.140	0.002	-0.157	-0.328
5	-0.659**	-0.243	-0.106	-0.458*	0.001	-0.266	-0.226

<sup>a</sup>\*\*significant at the 0.05 level; \*\*significant at the 0.01 level.

## Appendix C The Influence of Country, Museum-type and Discipline

### 1. Country differences

There are more differences between museums from the USA and those of other countries in questionnaire scores—and the scores of US museums are on average better than others. Of the 28 significant items distinguishing the better museums, 16 are involved in distinctions between countries. The US museums differ significantly from those in *all* other countries in 10 items but from each of the other countries in up to 17 items. In all 30 items are involved in these distinctions between US museums and those in other countries. The US museums are better in all cases where there is a difference with the exception of item 36, involvement of staff in formulating their training program, where UK museums score better than those from the USA. Canadian museums are better than UK museums in all of the items which distinguish museums in the two countries.

By and large the same items distinguish the museums of the different countries from each other. Four items most frequently figure in the distinctions: modelling by senior managers of appropriate behaviour (13), regular assessment of performance (39), efficient information transfer (42) and an active interest by staff in the information communicated to them (43). Leadership and Board items are more important issues in comparisons of museums in the USA with those in other countries. Public programs are a significant issue in comparisons of the USA with all others and with US-Australia and Canada-Australia comparisons. Training, communication and information technology are also areas of difference.

## *2. Differences between types of museums*

The data concerning museums of different types (Table 8) is not really robust enough to draw firm conclusions. However, some general features seem to emerge. Where there are differences, they mainly concern the Board and Public Programs. The staff of science centres and museums generally have more positive perceptions than do those of other museums; art museum staff are less positive. Public program items distinguish almost all kinds of museums. In most cases these differences are more apparent when individual responses are analysed, especially where issues concerning the Board are concerned; this would be due to the larger number of cases in the samples.

## *3. Differences between discipline areas*

The greatest differences between the staff of different discipline areas are between curatorial/research respondents on the one hand and finance/HR on the other (Tables 9 and 10). Generally, curatorial respondents are less positive—or perhaps more sceptical, than most others including information management/library respondents. Finance/HR respondents are generally more positive; so are Public relations staff. Education/exhibitions respondents are generally less positive than most other staff.

The items which are principally involved in discriminating between staff of different discipline areas particularly concern public programs. There are differences also in respect of some demographic items such as administrative level and length of service: staff in finance, HR and public relations areas are generally employed at lower levels and have been employed for less time in the museum than staff in curatorial and most other areas.

Table 8. Possible differences between "museums" of different kinds: NATH=natural history museum; SCI-C=science centre or science museum; HIST=history museum; ART=art museum. The symbol + indicates that the first of the pairs has a significantly better score than the second. For example, natural history museums are less likely to speedily attend to problems with public programs than are science centres whilst science centres are more likely to provide a variety of ways in which to understand the meanings of exhibits

QN	SECTION	DETAIL	NATH	SCI-C	SCI+C	NATH	HIST
			vs SCI-C	vs HIST	vs ART	vs ART	vs ART
26	PURPOSES	We aim to ensure that completed projects meet the required standards first time		-	-		
51	PUBLIC PROGRAMS	Problems experienced by visitors with public programs are speedily and appropriately attended to by staff of the relevant section	-	+			
53	PUBLIC PROGRAMS	Visitors are provided with a variety of ways (interpretive strategies) in which to understand the meaning of the exhibits/programs	-	+	+		+
54	PUBLIC PROGRAMS	Educational offerings attempt to address the full range of knowledge, attitudes and understandings which visitors bring with them			+		+
57	PUBLIC PROGRAMS	Exhibits and other public programs are developed by education, exhibition and other staff as well as research and curatorial staff working together			+	+	+
59	PUBLIC PROGRAMS	All those involved in public programs clearly understand the criteria for program choice	-		+		
60	PUBLIC PROGRAMS	The amount of money allocated to advertising and promoting public programs is based on knowledge of what expenditure is required to reach the desired proportion of the target market	-	+			
62	PUBLIC PROGRAMS	Public program staff are accepted by others including research and curatorial staff as important contributors to the future of the organisation	-		+		

Table 9. Comparison of perceptions of Curatorial and Conservation (Curat), Finance and Human Resource (FinHR) and Education and Exhibitions (Educ) staff with the perceptions of all other staff; + indicates that the first of the pairs has a significantly better score than the second, e.g. curatorial/conservation staff are less likely than other staff to consider that objectives for departments integrate with those for the organisation as a whole, whilst staff in finance and human resource areas are more likely to consider that objectives are integrated across departments than are staff from other disciplines/departments

QN	SECTION	DETAIL	Curat vs all others	FinHR vs all others	PR vs all others	Educ vs all others
2	ADMINLEV	Administrative level	-	+	+	
5	LENSERV	Length of service	-	+	+	
20	PURPOSES	Objectives for divisions/ departments/sections clearly integrate with those for the organisation as a whole	-	+		-
51	PUBLIC PROGRAMS	Problems experienced by visitors with public programs are speedily and appropriately attended to by staff of the relevant section	-	+		+
56	PUBLIC PROGRAMS	The staff/consultants who undertake evaluation of public programs co-operate to improve program effectiveness by contributing the results of their work to decisions about programs	-	+		-
59	PUBLIC PROGRAMS	All those involved in public programs clearly understand the criteria for program choice	-			-
60	PUBLIC PROGRAMS	The amount of money allocated to advertising and promoting public programs is based on knowledge of what expenditure is required to reach the desired proportion of the target market		+	-	-
61	PUBLIC PROGRAMS	Staff responsible for conservation of collections work to ensure that wherever possible the objects will be available for use in public programs and scholarship	+	-		
62	PUBLIC PROGRAMS	Public program staff are accepted by others including research and curatorial staff as important contributors to the future of the organisation	+			-

Table 10. Comparison of perceptions of staff from various disciplines—Curatorial and Conservation (Curat), Finance and Human Resource (FinHR), Public relations (PR) and Education and Exhibitions (Educ); + indicates that the first of the pairs has a significantly better score than the second, eg curatorial/conservation staff are more likely than Education/Exhibitions staff to consider that problems with public programs are speedily attended to but less likely than staff from Finance and Human resources areas

QN	SECTION	DETAIL	Curat vs Educ	Curat vs FinHR	Educ vs FinHR	PR vs Curat	PR vs FinHR	PR vs Educ
2	ADMINLEV	Administrative level		-	-	+	-	
5	LENSERV	Length of service		-	-	+	-	
20	PURPOSES	Objectives for divisions/departments/sections clearly integrate with those for the organisation as a whole		-	-	+		+
51	PUBLIC PROGRAMS	Problems experienced by visitors with public programs are speedily and appropriately attended to by staff of the relevant section	+	-		+	-	-
56	PUBLIC PROGRAMS	The staff/consultants who undertake evaluation of public programs co-operate to improve program effectiveness by contributing the results of their work to decisions about programs	+	-	-	+	-	+
59	PUBLIC PROGRAMS	All those involved in public programs clearly understand the criteria for program choice	+		-	+		+
60	PUBLIC PROGRAMS	The amount of money allocated to advertising and promoting public programs is based on knowledge of what expenditure is required to reach the desired proportion of the target market	+	-	-		-	+

## Footnotes

1. The work of Herman and Heimovics (1994) and Herman et al. (1997) are examples of the use of performance indicators identified as appropriate by those working in the sector, an approach termed relativist (or social constructivist), the view that each approach to the evaluation of effectiveness is equally valid and that there is no real organisational effectiveness, only judgements of effectiveness. We do agree that evaluation should not be done by anyone from any of the constituencies involved in transactions with the organisation. Zammuto (1984, p. 612) observes, "Much

Table 10. - Continued

QN	SECTION	DETAIL	Curat vs Educ	Curat vs FinHR	Educ vs FinHR	PR vs Curat	PR vs FinHR	PR vs Educ
61	PUBLIC PROGRAMS	Staff responsible for conservation of collections work to ensure that wherever possible the objects will be available for use in public programs and scholarship	+	+		-	+	
62	PUBLIC PROGRAMS	Public program staff are accepted by others including research and curatorial staff as important contributors to the future of the organisation		+		-		+

of the historical confusion surrounding the definition and criteria of organisational effectiveness has been caused by the process of societal evolution” and much of it “parallels dilemmas found in management practice”.

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