

**OPEN PROJECT MANAGEMENT (OPM):  
PEOPLE, PURPOSE, AND MUSEUM PROJECTS**

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by

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## **Thesis Abstract**

### **Open Project Management (OPM): People, Purpose, and Museum Projects**

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The aim and purpose of this thesis was to understand how different types of museums use project management in capital projects and whether existing project management theory and practice is fit for museums. There is an opportunity to learn and build on existing knowledge of museum, organisation, and project management theory and practice by creating a common-goal, flexible-framework approach to Open Project Management (OPM).

Semi-structured interviews were carried out with thirteen senior museum staff and thematic analysis was employed to analyse the data, which were part of case studies of museum projects: Ashmolean Museum; Imperial War Museum London; Victoria & Albert Museum; Museum of Oxford; Museum of the Order of St John; and interviews with members of staff from the British Museum, Compton Verney and wider museum profession. I also applied an autoethnographic approach as I included my experiences as a museum project manager (Ashmolean 2007-2014). Several broad themes emerged from the research. First, new ways of organising – the mission of the museum was often the same as the project, which meant that the senior staff referred to the project as ‘change’ in the organisation, rather than something additional. Second, project management which included collaboration of staff inside and outside the organisation was evident, but was applied differently in each type of organisation. Finally, the importance of the external stakeholders, including funders, was important.

Although there are many examples of museum capital projects across the UK, the literature and critical analysis of these projects and processes is lacking in comparison to work carried out worldwide by researchers from a range of disciplines. There is an opportunity to bridge the differences and areas between organisation theories, including leadership and motivation, and project management in order to create a more effective and broader approach to managing projects in museum organisations.

## Acknowledgements

This thesis has taken a long time, as I enrolled as a distance-learning/part-time student in 2010, while I continued to work full-time in the Ashmolean Museum until 2014, and was then given the opportunity to run TORCH (The Oxford Research Centre in the Humanities) in the University of Oxford. Life has changed significantly since I began this research. My brothers, Nick and Paul, will always be missed and were taken far too soon. I have been blessed with my husband, Richard, and our children, Maddy and Bradley. Without Richard, I am not sure I would have survived the last few years and I certainly would not have completed this thesis. This is dedicated to all of them.

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## List of Abbreviations

|                |  |
|----------------|--|
| <b>ACE</b>     | Arts Council England   |
| <b>APM</b>     | Association of Project Management                                    |
| <b>ASH</b>     | Ashmolean  |
| <b>CCPM</b>    | Critical Chain Project Management                                    |
| <b>COO</b>     | Chief Operating Officer  |
| <b>CPM</b>     | Critical Path Management   |
| <b>DCMS</b>    | Department of Culture, Media and Sport                               |
| <b>DMT</b>     | Department Management Team   |
| <b>HLF</b>     | Heritage Lottery Fund  |
| <b>IWM</b>     | Imperial War Museums   |
| <b>MLA</b>     | Museums Libraries and Archives                                       |
| <b>MOO</b>     | Museum of Oxford   |
| <b>MOSJ</b>    | Museum of the Order of St John                                       |
| <b>NMDC</b>    | National Museum Directors' Council                                   |
| <b>OPM</b>     | Open Project Management  |
| <b>OUMP</b>    | Oxford University Museum Partnership                                 |
| <b>PERT</b>    | Program, Evaluation and Review Technique                             |
| <b>PESTLE</b>  | Political, Economic, Social, Technological, Legal, and Environmental |
| <b>PMI</b>     | Project Management Institute   |
| <b>PID</b>     | Project Initiation Document  |
| <b>PRINCE2</b> | Projects IN Controlled Environments                                  |
| <b>RAID</b>    | Risk, Assumption, Issue, Dependency                                  |
| <b>SARFIT</b>  | Structural Adaptation to Regain Fit                                  |
| <b>TORCH</b>   | The Oxford Research Centre in the Humanities                         |
| <b>UK</b>      | United Kingdom   |
| <b>V&amp;A</b> | Victoria and Albert Museum   |

## **CHAPTER 1**

### **Project Management in Museums: an introduction**

Over the last two decades, significant museum redevelopments have been carried out through capital projects. By looking at how museum organisations react, develop, and respond during capital projects, the primary focus of this thesis is to understand the area of museum capital projects, the project management theory and practice used, then developing the lessons learned into a model of context-based project management applicable to the cultural and non-profit environment. This thesis asserts that what is key to museums are the people that work in them collectively as an organisation, and come together through common purpose to make projects happen. Multiple sources are used, including interviews and a partly autoethnographic approach, to evidence this and explore how museum organisations react, develop, and respond during capital projects.

Many museum capital projects in the United Kingdom (UK) have been externally funded, as museums have responded to the growing and more visible needs to the public, contributing to why, and how, museums undergo projects (Jacobsen 2016: 5). Since 1994, the Heritage Lottery Fund (HLF) has been the 'largest dedicated funder of heritage in the UK', awarding £7.7billion to over 42,000 projects (HLF 2017). The role of project management within a museum context has been touched on in museum studies publications (Moore 1999; Fopp 2001; Crimm, Morris & Wharton 2009; Lord, Dexter Lord & Martin 2012; Ambrose & Paine 2012; Lord & Piacente 2014; Walhimer 2015; Morris 2017) and practical papers have highlighted that the 'pressures for improved project management within museums come both from within the sector and externally' (Hilton 2004: 2). However, in many cases, as this thesis will demonstrate, it does not go into enough depth, and where it does, it does not focus on UK related projects and museums, nor does it take account of the specificity of the museum in the process. This research is partly in response to these major change factors to museums in the UK and the specific relationship to the changes in this environment,

and the subsequent growing need for museums as organisations to be more relevant, responsive, and sustainable (Walhimer 2015: 94).

There is a disconnect between project management theory and practice and the environment in which museums exist and operate, as well as between leadership and project managers (Morris 2017). Following a major physical change, what happened to the museum as an organisation? A capital project needs to consider not only the physical changes to a museum, but also the changes to the museum as an organisation. This study draws on developments in the areas of project management in museums, and integrates the theoretical and practical approach of project management for museum capital projects. There is also material written from an organisation theory and project management perspective (Drucker 2006, Brooks 2006, Curlee & Gordon 2011, Lock 2013) but it does not address the specific organisational culture, structure and history of a museum during and following the effects of a capital project. Building on this material, this thesis also brings in evidence from leadership and motivation theories to highlight the specific nature of museums (Drucker 2006, Laufer 2012, Lord & Piacente 2014, Morris 2017) and the fact that people with common purpose result in successful museum projects. Project management theory and practice does not take into consideration the culture, structure and environment of museums, and there is an opportunity here to explore and develop a more appropriate approach in open project management (OPM). This would include a flexible-framework focus, which would map onto the museum organisation structure and shape, and work with the museum's mission in a common-goal approach. By exploring and investigating the impact of capital projects on UK museums from a perspective of their organisational culture, structure and behaviour, this study contributes to this growing area of research into museum projects.

### **Organisation Theories: structure and culture, and relevance to museums**

Theories of organisations, project management, leadership and motivation have sought to address the behaviour of individuals and groups of people in organisations and projects. Organisational theories have developed over many decades and this research will explore theories of organisation and how they relate to museums as organisations. Building on that, it is clear that there are significant gaps in the

literature that specifically relate to museums as organisations and how they act and develop during projects. It is apparent that there is no clear approach and outline for museum organisations and project management for capital projects in the UK. For example, literature on non-profit organisations (Oster & Wolfe 1995, Buchanan & Huczynski 2004, Brooks 2006, Drucker 2007, Hatch & Cunliffe 2013) does not clearly relate to museums. The progress in management literature shows that there are opportunities to challenge and progress museum management. This could challenge assumed institutional and intellectual boundaries and act as a call to further creative experimentation, which should in future museum studies literature also include autoethnographic accounts along with the academic (Grewcock 2014: 212). Museum studies literature has expanded extensively in many areas, but does not currently address and acknowledge in specific detail the need for consideration of capital projects and project management in UK museums. Fopp wrote in 2001 about managing museums, and other related museum studies researchers include references to museum organisations and project management, but not always in the context of a UK environment (Dexter Lord & Lord 2009, MacDonald 2010, Carbonell 2010, Lord, Dexter Lord & Martin 2012, Barrett 2012, Black 2012, Aronsson & Elgenius 2014, Woronkiewicz 2015, Morris 2017). The theoretical underpinning and practicalities of museum project management is currently mainly missing from the museum studies literature, particularly a UK focussed understanding of this. Work has been produced from a non-UK perspective (Griffin 2008, Ghelani 2014, Morris 2017), but not UK capital project related. My thesis aims to explore the gaps between the different disciplines of organisation, management, leadership, and museum studies in particular with regards to the English experience over the last two decades.

### **Project Management in Museums**

Project management methodologies highlight the contrast between the ‘creative’ environments and standard project management process. In project management, all risk is managed and prioritises mitigation as much as possible, with the focus on the time and cost of the project (Richardson 2015: 303). It is the linear journey of most projects that does not take account of a creative space, because the creative connections are multiple and multidirectional. One of the strengths of a museum lies

in its role and its ability to change, albeit slowly, in order to accommodate the political, social and economic changes of the environment in which it sits. “Museums are ever changing, adapting to the pressures of the society in which they exist and which they seek to serve” (Watson 2007: 27). Ten years on from this observation, this situation is even more true today than it was then. There is a need for wider understanding and a clearer approach to museum organisations and projects (Sandell and Janes 2007: 104). The need for a broader understanding of organisation theory and project management practice is shown at Glenbow, for example, as the museum prioritised project management skills the team when doing the Glenbow redevelopment. They, in fact, invested directly by paying for some of the staff to gain project management qualifications (Janes 2013: 96) as well as having a clear response to the organisation and project based roles and structures for Glenbow (Janes 2013: 48).

### **Contributions of this Research to the Field**

In broader terms, this research will contribute to a better understanding of the relationship of museums and museum projects, and museum project management. By recognising and working with the open and creative environments of organisations like museums, this thesis will contribute to a more context-based and flexible and responsive project management approach.

It will contribute a theoretically based practical approach for museum capital projects. Museum projects are ephemeral; they are all-important during the project then once it is over people move on and the project fades from view. The research in this thesis is an important snapshot of the process from the perspective of some of the key players at a senior level for museum projects carried out between 2001 and 2017. If these interviews had not been carried out, it is quite likely that this sort of experience within projects would never be documented. My own work on projects gives me an insider knowledge of how much is not written down, and so gives the opportunity for a more ethnographic approach to this research.

### **Research Questions**

Following an initial literature review and assessment of potential fieldwork, the

research questions were adjusted to take into account the broader environment of museums. These are summarised as:

1. Do capital projects and project management also change the museum as an organisation, and does the project process and approach depend on the type of museum doing it?
2. Are senior museum staff aware of the organisational change in structure and culture during capital projects?
3. How does the organisational culture affect the museum's behaviour during a project?
4. Are museums designing the consequential changes to their organisational structure, or reacting to the changes in their environment?
5. Can project management be made more relevant as a process to museums?

### **Research Methodology**

In order to build on and test the ideas brought up in the literature review, the fieldwork included broader use of documentation from museum projects, online blogs and report material, and funders' reports and summaries. Following analysis of these, the interviews were carried out with senior museum staff who had been involved in capital projects. The analysis and discussion were brought together with the literature on organisational culture and structure, and project management theory and practice from a museum and project perspective.

An important consideration in the methods is my position as a researcher, particularly as one of the prime case studies is one in which I was an agent. Autoethnography (Denscombe 2015: 82) is a qualitative research method that allows the author to write in a highly personalised style. This allows me to draw on my work experience also in order to extend understanding about the case studies and from the perspective of a project manager. My previous experience includes working at the Ashmolean Museum in Oxford as a Project Manager and it is important that I address my role in the case

studies. It was necessary to have a more 'distanced' analysis of something I was involved in, but it is also true that my experience can also provide insight on areas that were not written in reports and a view from the ground and 'in the thick of things' (Adams, Jones & Ellis 2015: 22). I am focussing on the UK museums where I have the most in-depth access to museum case studies and the people involved in them. I worked at the Ashmolean, and I have permission to use all the relevant documentation for this project, as well as the involvement in the interview section of three senior directors from the Museum at the time of the capital projects. It is critical that I recognise and address the biases which may arise from researching projects in which I was directly involved. Being able to be reflexive and use my voice in these case studies enables me to contextualise more subtle, normally unrecorded and assumed ways of working that are embedded in museums and to explore more widely this context. Therefore, my experience of the practicalities and ability to be both subjective and reflective will be a strength to this research project (Denzin 2014: 76).

I was a Project Manager for seven years (2007-2014) during and after the major £61 million redevelopment of the Ashmolean. My role began as a Personal Assistant to the Deputy Director (Collections) Professor Nick Mayhew and then incrementally over my first year in post, I was given more responsibilities relating to the redevelopment and by the second year, I was overseeing the work of object processing and mountmaking activities, which included line managing two teams of up to twelve individuals and significant budgets. Our work streams followed 'Curatorial and Design' and led into 'Gallery Installation', a pivotal and important part of the overall redevelopment. Collectively, the areas I oversaw made savings to the museum project of over £750,000 by bringing work internally to the museum and combining only where necessary with external contractors for mountmaking and installation. My research questions have come from a practical experience, which is mostly from a university museum perspective. I wanted to explore whether the methodologies and theoretical approaches could also be relevant in other museums types, or whether the museum type influenced the type of project approach taken. The Ashmolean Redevelopment was vast; vast in scope, size, reach and in delivery (Ashmolean 27). The project was a success in many ways and was very well received across many audiences. The number



of visitors before the project was around 380,000 per year. The first year following the opening, the numbers topped 1 million and continued at least 800,000 in the years following. I argue that analysing the Ashmolean as a case study, along with other museum capital and major projects, will enable me to understand better whether project management in museums exists as its own disciplinary approach, or if it is a bolt-on bought in through external freelance project managers. By examining the processes of several museum projects from different parts of the sector (national, university, independent and local authority) and also collating the reflections of the senior staff in these projects, the intention is to better understand the ability of museums to use and experience projects effectively and efficiently. Also, to see if there are recommendations following this research across the sector to museums who plan to undergo major projects, so that they can work more effectively for their organisation.

My fieldwork involved a combination of data collection methods that contributed to case studies of museums that have undertaken such major projects. The main objective of my work is to build upon the solid foundations of research into museum management, focussing on the relatively new issues related to capital projects and their management within museums. I aim to analyse their initiation, life cycle and consequent evaluation in order to establish the impact and influence of public funding, its relevance to the environment and stakeholders. Creativity is a key aspect of museum project work, however, the main focus of this research here is with management and the museum as an organisation.

### **Data Collection**

The research developed in this thesis was based on the data collected through case studies for several UK museums: Ashmolean Museum, Victoria & Albert Museum (V&A), Imperial War Museums - London (IWM), Museum of the Order of St John (MOSJ), and the Museum of Oxford (MOO).

### **Selection Criteria for Museum Project Examples**

Each museum was chosen as part of the research project because it had undergone

capital projects and those selected represent different types of museums (national, university, independent, local authority). I also chose examples for which I knew I would be able to get enough, and reliable, data. Following the literature study and review, it was possible to identify the main research questions for investigation, and approach each data source and the collection process carefully using these museum project examples. This work has been conducted over several years (2009-2017) as I was undertaking this PhD part-time, while working full-time.

A range of examples were chosen to illustrate the different types of museums (national, university, independent, local authority and different sized projects from £61 million to £300,000). The extent to which they are directly comparable is through thematic analysis and observation, such as recruitment and use of a project manager and project team members, involvement of senior staff in project decisions, role of funders in the project throughout etc.. However, all projects will have their own specific tensions and contexts so this research, while acknowledging this, looks for general findings that can be applied to more than one project.

**Figure 1: Museum Project Case Studies**

| <b>Museum Project</b>  | <b>Key Facts</b>                        | <b>Activity</b>                             |
|--|---|---|
| <b>Ashmolean Museum<br/>Redevelopment</b>                      | Completed December 2009,<br>£61 million | Capital, gallery redesign                   |
| <b>Cast Gallery,<br/>Ashmolean Museum</b>                      | Completed October 2010,<br>£350,000     | Internal refurbishment,<br>gallery redesign |
| <b>Ashmolean Museum,<br/>Broadway</b>                          | Completed September<br>2013, £300,000   | Capital, gallery design                     |
| <b>Imperial War Museums<br/><i>Transforming IWM London</i></b> | Completed July 2014,<br>£40 million     | Capital, gallery redesign                   |

|   |  |  |
|---|--|--|
| <b>Victoria &amp; Albert Museum,<br/>London</b><br><i>FuturePlan</i>          | Projects since 2001.<br>£49 million (Exhibition<br>Road) | Capital, gallery redesigns<br>and movement of main<br>entrance |
| <b>Museum of the Order of St<br/>John, London</b><br><i>Open Gate Project</i> | Completed in 2011,<br>£4.1 million                       | Capital, gallery redesign                                      |
| <b>Museum of Oxford</b><br><i>Oxford's Hidden Histories</i>                   | Not complete – began in<br>2016, c. £2.8 million         | Capital, gallery redesign                                      |

### Document Analysis

In addition to the interviews, this research project included analysis of documents related to the projects in Figure 1 that are in the public domain and also museum internal documents, where I have been given permission to use them as part of this thesis to solicit and confirm data. Using several sources enables me to use several angles to explore and test the data against theories and findings. Using the quantitative and qualitative data from the interviews, documents and publications, findings are assessed that explore the themes and commonalities across the data set. Using a grounded theory approach to bring out theories from the data, these themes are cross-referenced with each data type in order to prove or challenge the ideas that come out, until a coherent list of narratives is apparent.

## Brief Outline of Museum Case Studies

### Case Study 1

**Ashmolean Museum, Oxford**

**Museum type: University Museum  
(University of Oxford)**

**Project: Ashmolean Redevelopment**

**Cost: £61 million (completed December  
2009)**

**Architect: Rick Mather**

**Display Designer: Metaphor and internal  
Ashmolean Design Team**



**Figure 2: Ashmolean Museum – central atrium and staircase  
(Andy Matthews/Rick Mather Architects)**

The Ashmolean kindly gave me permission to use their projects as examples in my thesis, which gave me access to the internal documents, as well as the published materials.

Established in 1683 and known as the first museum in Britain, it underwent a £61 million refurbishment, which was completed in November 2009, and brought in one million visitors in its first year. The first phase of the transformation created a new building, replacing all but the original 1845 Cockerell Building. The gallery space was doubled and included a new Education Centre, and three new study centres to allow “hands-on access to research collections, and conservation facilities” (Ash 2009).

Two of the other projects I managed were the Cast Gallery Refurbishment and Redisplay (completed November 2010) (Ash 2010) and the independent museum Ashmolean Museum Broadway (opened in September 2013) (Ash 2013).



**Figure 3: Ashmolean Cast Gallery (ground floor) refurbished and redisplayed in 2010 (Ashmolean Museum)**

For the interviews, the following members of staff kindly agreed to be interviewed as part of this research: Christopher Brown (Director until 2014), Nick Mayhew (Deputy Director until 2009, Coin Curator until 2013), Robert Thorpe (Operations Director until 2013), Andy Bramwell (worked as an external Project Manager on the redevelopment), and Lucy Shaw (Oxford University Museum Partnership (OUMP) Manager).

## **Case Study 2**

**Victoria and Albert Museum (V&A),  
London**

**Museum type: National Museum**

**Project: FuturePlan (Programme of  
redevelopment of the V&A since 2001)**

**Cost of latest phase: £49 million on  
Exhibition Road (completed July 2017)**

**Architect/Design (for Exhibition Road):  
AL\_A (Amanda Levete Architects)**



**Figure 4: Glass chandelier in the lobby of the V&A Museum**

(Creative commons credit: [www.heatheronhertravels.com](http://www.heatheronhertravels.com))

The Victoria and Albert Museum (V&A) is ‘the world’s leading museum of art and design (and) houses a permanent collection of over 2.3 million objects that span over 5,000 years of human creativity’ (V&A 1).

The V&A have developed a phased approach to capital projects called ‘FuturePlan’. According to the V&A’s website, “FuturePlan is an ambitious programme of development which is transforming the V&A. The best contemporary designers are creating exciting new galleries and visitor facilities, while revealing and restoring the beauty of the original building. In the past 15 years, over 85% of the Museum’s public spaces have been transformed, improving access and allowing the collections to be more elegantly and intelligently displayed” (V&A 9).

I interviewed one of the ex-Directors (2001-2011) Mark Jones, and the museum has published a lot of information about their projects and their approach to projects and project management.

“We wanted the public to know that this was an ongoing process rather than closing the museum and reopening after a refurbishment.”

(Jones 2016 Interview)

The subsequent Director, Martin Roth (2011-2016), came to speak in Oxford and I interviewed him for a short video for the TORCH website (TORCH 2014). This interview was not part of the fieldwork, but is online and available to the public. I also interviewed one of the Trustees, Mark Damazer. In 2010, the project team planning the redisplay of the Cast Courts came to visit me at the Ashmolean to see our redisplay of the Cast Galleries. I was invited to visit them in London and talk about their plans too, and also sit in and observe their project meetings. All of this made me more aware of their long term FuturePlan programme and the projects within it. This was at an early stage and before my ethical approval process for this thesis, so I am unable to use this information directly in my thesis, however, much like my career experiences working in museums, my time with the Project Team at the V&A greatly increased and influenced my understanding and the direction of my research.



### **Case Study 3**

**Imperial War Museum (IWM), London**

**Museum type: National Museum**

**Project: Transforming IWM London**

**Cost of latest phase: £40 million (opened July 2014)**

**Architect/Design: Foster and Partners**



**Figure 5: Imperial War Museum London -The new atrium - July 2014  
(Ashley Pomeroy IWM\_2014\_5760)**

In April 2012, the IWM announced plans to transform IWM London and aim to create a long-lasting legacy for the First World War, in time for the centenary of 2014 – 2018. The redevelopment took two years and involved the relocation of large objects and the restoration of hundreds of artefacts from the collections. IWM London reopened on 19 July 2014 and revealed the redisplayed atrium and new displays covering themes from British conflict from 1914 to present. The £40 million redevelopment, designed by Foster and Partners, provides new gallery spaces dedicated to the history of the First World War, a new central hall, easier navigation and improved visitor facilities, access and circulation (IWM 1, IWM 2).

The Imperial War Museum in London was chosen as an example for this research because it had completed a capital project to redesign and display the main atrium and World War I galleries, reopening in July 2014. Also, the refurbishment is part of a



larger overall scheme involving several phases of redevelopment and locations, since the Imperial War Museums is made up of several sites, which includes IWM London; IWM North in Trafford, Manchester; IWM Duxford near Cambridge; the Churchill War Rooms in London; and the historic ship HMS Belfast.

I met Diane Lees (Director-General of Imperial War Museums) because she had spoken at an event in Oxford, and she kindly agreed to speak to me regarding their project work. Lees also included her colleague, Vanessa Rayner, who was heavily involved in the projects.

#### **Case Study 4: Museum of the Order of St John (MOSJ), London**

**Museum type: Independent Museum**

**Project: Open Gate Project**

**Cost: £4.1 million (reopened November 2010)**

**Architect/Designer: Metaphor**



**Figure 6: Museum of the Order of St John – 2010**

**(Metaphor/Hutton & Crow)**

The Museum at St John's Gate in Clerkenwell, London was a Tudor gate house built in 1504 as the entrance to the medieval Priory of the Order of St John, and the English

Headquarters of the Hospitallers. The Museum at St John's Gate has been welcoming visitors for over a hundred years (MOSJ 2017). The collections tell the story of the roles of the Order, with its unique blend of religious, military and medical history. Before the refurbishment, the displays had been the same since the 1970s and were in need of renewal in order to tell the story to the widest possible audience, educate new generations, and make the collections accessible to everyone. In September 2009, the Museum of the Order of St John closed to the public to begin a Heritage Lottery Funded redevelopment. Fourteen months later, it reopened with new galleries and visitor facilities, including a dedicated learning space (Metaphor 2010, MOSJ 2017).

This museum is included because I worked as part of the team on this project, but as a contractor. I set up commercial services to other museums called 'Ashmolean Museum Exhibition Services', which meant that I could generate income using my team of museum technicians and mountmakers when they were not working on internal Ashmolean projects. We were hired by MOSJ to do the mountmaking and some of their installation of the galleries. The then Curator, and now Director, Tom Foakes agreed to be interviewed as part of this thesis.

### **Case Study 5: Museum of Oxford**

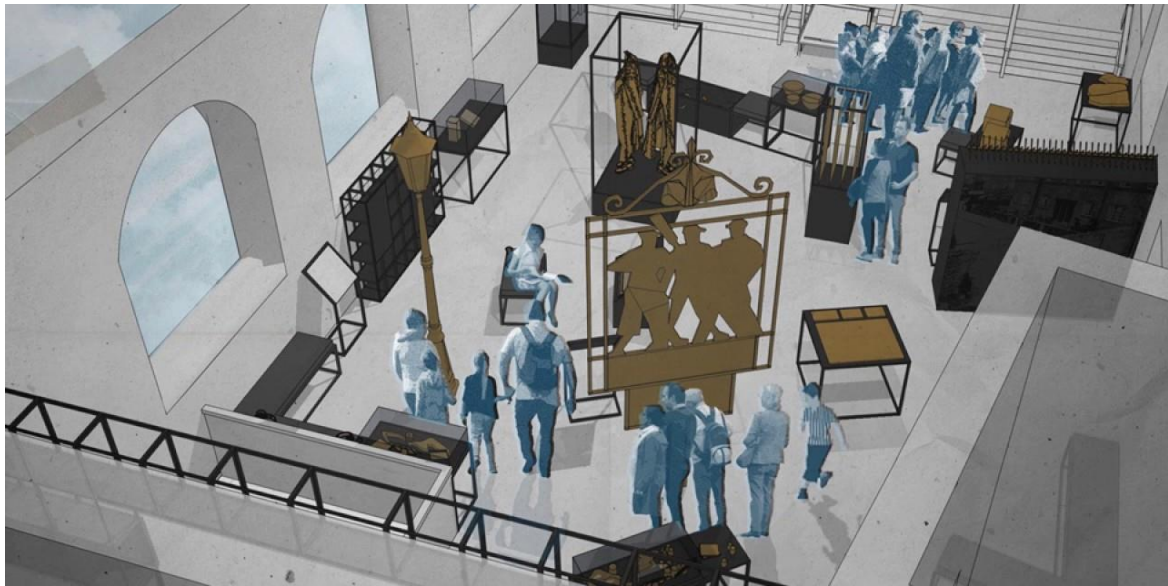
**Museum Type: Local Authority Museum (Oxford City Council)**

**Project: Oxford Hidden Histories**

**Cost: TBC c.£2.8 million (project in early stages)**

**Architect: Purcell**

**Design: Simon Leach Design**



**Figure 7: Design plans for the Museum of Oxford redevelopment ‘Oxford Hidden Histories’ (Oxford City Council/Museum of Oxford/Simon Leach)**

The Museum of Oxford has planned an ambitious project called *Oxford’s Hidden Histories*. The project aims to open up and share the heritage of the city’s communities through stories that radiate out from the Town Hall, the historic building at its centre. This will be achieved by redeveloping the Old Museum space which closed in 2011. It will transform the Museum of Oxford’s facilities. There will also be a new shop and reception desk, accessible from the entrance of the Town Hall, and improved facilities for the museum’s more than 100 volunteers (MOO 1 2017)

This project was chosen because I became a Trustee and had also been working closely with Oxford City Council’s Head of Culture and Strategy, Peter McQuitty. Although the project is at an early stage, it is interesting to see the motivations and processes for this part and include it in the fieldwork for this research.

## **Research Ethics**

Once the scope of the research was clear, this research project was processed through and carried out in accordance with the University of Leicester's Code of Research Ethics. Before any fieldwork was carried out, the full research ethics approval process was completed and approved on the 19<sup>th</sup> April 2016 by the Ethics Officer at the School of Museum Studies, University of Leicester. All paperwork was shared with interviewees in accordance with best practice and regulations, both so that they knew the overall research project they were contributing to and also making it clear that participation in this research was voluntary, and that individuals were free to withdraw at any time. Examples of the paperwork is in the appendices.

## **Interviews**

As part of the case study approach, the type of interview method used was semi-structured in order to enable the theories from my literature to be tested but also to allow the individuals to speak on what they thought was relevant, and for me to be able to follow the flow of the conversation. In doing so, a grounded theoretical approach could be used to draw theory from the analysis of the results too (Denscombe 2015: 16). The interviews were recorded, with their permission, so that I could listen to them repeatedly. They were analysed and thematically coded to enable analysis of the patterns of what was agreed on and also what was missing. This is outlined in more detail in the methodology chapter. The interviewees were thirteen museum professionals involved in museum projects across several museum types. The first phase included interviews with seven people in six interviews and was followed by six interviews with a further six individuals. Detailed information on the interview group is available in the methodology chapter (Chapter 2: Researching into museum projects: research methodologies).

## **Interview Phases 1 and 2**

Once the ethical approval was granted, the first phase of interviews were carried out. This involved six senior museum staff, three of whom were from the Ashmolean Redevelopment originally, two from the Victoria and Albert Museum and two (in one

interview) from the Imperial War Museums. Overall, these three museums have collectively undergone around £200 million of capital projects in the last ten years.

This first phase gave some very rich data, with interviews taking between 1 and 1.5 hours each. Initial analysis and thematic coding illustrated that there were both commonalities across the interviews, as well as differences depending on the type of museum the interviewee was from. This led me to realise that a further round of interviews was necessary in order to explore these themes further and test the theory that there were differences based on the museum type. It also provided an opportunity to add in individuals who did not work directly on capital projects, but had other museum sector and project experience which would be useful to also test the theme and theories explored thus far. The second phase was carried out and broadened the sample of interviewees and data for analysis, which enabled me to thematically assess all the interviews together and assess for patterns, gaps, differences etc. The results of the interviews are brought together in charts in Appendix 4 and are referred to in Chapter 3 – Learning from museum projects: research findings.

### **Limitations of the Study**

The limitations of this thesis include the group of interviewees, number of case studies, and my role as researcher and also part of some of the examples. The group chosen are high level senior staff members, who have been chosen because of their role throughout the project and also their links with key external stakeholders including funders etc. It does not include project staff in the other areas of the museum. This may be a good group to include in future research projects to test the theories and outcomes of this thesis, but is not currently included in the scope for this piece of research. In order to deal appropriately with my role as researcher and also my 'insider' knowledge as a project manager, I have explored autoethnographic theories and methodologies, and ensured that all my input is backed up with other sources of evidence which include the empirical data from the interviews, as well as the written records related to the museums.

## **Structure of the Thesis**

The structure of this thesis involves three main areas. The first is the research findings and discussion. The second are organisational theories of culture and structure, which explore the relationship of museums to these areas and a theoretical context for the thesis. The third explores project management theory and practice. Each one takes the argument forward that in order for project management to be successful in a museum, it needs to take the organisation culture, structure and type into consideration, as well as the fact that museum organisations are made up of people, as well as collections, who enable a project to happen. Therefore, a flexible-framework approach to open project management (OPM) is the best method for museum capital projects.

Chapter 2 (Researching into museum projects: research methodologies) outlines the methodological approach taken, with attention to my position as the researcher, and overall research design, process, and methodology in consideration with the main research aims. It also outlines the museum case studies and the interviewees.

Chapter 3 (Learning from museum projects: research findings) brings together the research fieldwork findings and discussion along with the theory and practice from literature sources. The main themes from the coding of the interviews brought out that there are several popular themes with the senior museum staff, including 'museum organisation' and 'staff' and this was carried through into the discussion in the subsequent chapters. This is also supported through the overall key findings in this chapter, which included that museums undergo capital projects with the intention of changing the physical aspects, but projects also affect the museum as an organisation too through its structure and culture. Other findings include that the reasons museums undergo capital projects vary depending on the type of the museum, as do the project management processes. Moving on from these, there is a gap in the market for a museum focussed project management approach, and museum senior staff quite often have come from a collections specialism background.

Chapter 4 (Museums as Organisations: culture and behaviour) explores how the internal culture and behaviour of a museum determines how it acts during a project; that the museum organisational culture is interwoven with motivation and leadership

theories and influences how projects are carried out through an organisation. This means they are connected to each other and respond reciprocally; a common-goal approach, which maps onto the museum's organisational mission, is needed in order for a project to be 'owned' throughout the museum; the role of the museum as an organisation contributes to why it goes through capital projects; project management in museums should have a flexible-framework that incorporates consideration for the culture and structure of the museum and recognises that creative organisations operate differently to commercially focussed organisations.

Chapter 5 (Museums and their Environments: structures and response) looks at museums and how they are in open systems and are affected by their external environment, and how museums reflect and respond to this; the ripple effects of museum capital projects on the museum as an organisation, and the consequential effect on roles in museums and internal relationships; evolving and designing museum organisational structures; and projects as boundary objects in museums.

Chapter 6 (Open Project Management (OPM): new creative and context-based model) explores project management theory and practice and its relevance to museums. There is a disconnect between the linear and process led structure of project management approaches, and museums and creative organisations need an approach that can both have the boundaries needed to complete a project, but also incorporate the flexibility for the research and development that museums are able to generate. In this way, projects and project management can better serve the stakeholders involved in museums and ultimately make museum projects more efficient and successful.

## **CHAPTER 2**

### **Researching into museum projects: research methodologies**

#### **Introduction**

This thesis aims to explore capital projects in museums and identify ways in which project management in museums can be better understood. By exploring how capital projects are delivered in museums, and how, in turn, they are changed by them, this thesis intends to highlight how to manage complex projects such as capital builds within the distinct environments of institutions like museums.

Broadly, this will be done by looking at literature from museum studies, organisational and management theoretical sources, and project management. This will be developed with first-hand accounts of museum projects and primary and published documents to build a narrative and spectrum of evidence to support the research findings.

In this methodology chapter, I will explore and justify the choice of methods I have employed during my research project and I will demonstrate my understanding and interpretation of the various options for conducting research. Much of this chapter focusses on data collection, but it is also important to acknowledge the theories underpinning these techniques that I have used for research activities, including the literature review, data collection, case study selection, and data analysis. It is important to explore this properly and in depth in order to ascertain the most accurate and reliable analysis of the research, and also to identify potential areas for further research and wider interpretation for this project and follow-on research opportunities. This process is also necessary to identify any weaknesses in the methodologies, account for this, rectify use of them, and acknowledge them in this thesis.

Throughout the thesis, I explore literature at in edited volumes, which enables me to obtain a snapshot of different voices' views about museums, their functions and the potential role of projects in these. When planning to collect data, the planning and



design of the social research project is essential and necessary for best quality data and analysis (Blaikie & Priest 2017: 2). My focus has not been on 'pure' management theory and more on museums and their management, which explains the focus of this sort of literature. What is clear is that the research is better investigated through multiple angles so that it can be tested and understood at multiple levels. This is why the fieldwork builds on the literature review, with semi-structured interviews and their thematic coding and analysis, use of primary museum project documents and reports and media materials, as well as my own experiences as a project manager on museum capital projects.

The reason I chose these institutions is because I have access to the materials relating to capital projects, both through my own work and also because I have worked and connected with the people working at the other institutions. My role when involved in the project will need to be approached and studied differently than the experience of other project managers, for example. It is important to understand my role and also, when studying the material, how this might impact upon my impartiality. Looking at anthropological theories, more specifically autoethnography, there are theories that can be applied to this experience and influence and inform my approach to studying them.

### **Position of researcher**

The methodology for my research uses a mixture of methods. Through semi-structured interviews with museum senior staff, access to written materials and reports, I create a new body of research material and data, as well as using existing documentation to understand, explore and answer my research questions. I create, develop and use case studies and collaborate with museums to investigate how Institutions are affected before, during, and after what are often major funded capital projects.

In order to develop and reach targets and goals necessary to create more relevance to their communities, many museums take on projects or extensive programmes (a series of projects). Examples of such projects are regularly and extensively used in research papers by museum practitioners and researchers (Watson 2007, Golding & Modest

2013, Knell, MacLeod & Watson 2007, Sandell 2010, 2012, 2017). These authors delve into the changes in the displays and issues of representation and ownerships, as well as the ways in which museums are shaped and attempt to shape and change the environment around them. My fieldwork involves a combination of work with case studies of museums that have undertaken major refurbishment projects, which has naturally in turn also affected the organisation itself and its communities. The main objective of my work is to build upon the solid foundations of research into Museum Management, focusing on the relatively new issues related to project management and capital projects and situating this within museum practice and theory. I aim to analyse their initiation, life cycle and consequent evaluation to establish the impact and influence of public funding, its relevance to the museum stakeholders (Davies & Shaw 2013, Parsons 2014) and the on-going physical and psychological effect on the existence and continuation of the remaining museum staff and institution (Holmes & Hatton 2008, McCall & Gray 2014).

The deconstruction of the nature of museums is fundamental to the research methods I have used and the philosophies I have adopted. What is clear is that I can use it as a way of exploring the complex nature of museums. From this I can then explore, justify and explain the different methods I have used in my research. Cultures and identities change, evolve and reflect politics, social developments and often major issues and changes in society and conflict. The idea and discussion of identity is threaded throughout most of the papers that are part of Watson's 'Museums and their Communities' which also explores museums and their roles in their global contexts (Watson 2007). MacDonald also has 'identity' wrapped up in the discussions throughout, and specifically identity politics and how museums can become battle grounds, as they are a place where society represents itself (MacDonald 2011: 479). It should be argued that it is also a place where 'other' cultures are represented. Davis talks about the way in which cultural identity and 'ownership' can work together and says that in fact some collections should transcend national identities and become 'global heritage', but it is still difficult to fully answer the moral question about Western interpretation and location of collections (Watson 2007: 55). Knowledge can be subjective, depending on what is needed for those people at that time, and how it

is being interpreted. Sandell highlights the cultural relativism of human rights, for example. There will always be varying lenses through which it is viewed, and this will be influenced by the perception, culture and, ultimately, identity of the person viewing. But something like 'human rights' has become one of the 'most globalised political values of our time' (Sandell 2017: 13) and can reach across and connect with diverse groups of peoples due to their 'moral universality' (Sandell 2017: 14). Janes talks about the changes and demands that today's culture put on museums (Janes 2013: 262) in order to recalibrate their relationships with audiences. More specifically, Janes talks here about 'participatory culture' whereby the audience is not just the consumer but also the participant through production and contribution to the research (Janes 2013: 263). Cultures will continually adapt and change and researchers will continue to analyse, and interpret them, to be as close as can be to being objective and understanding reality. Knell talks about the 'reflexive relationships between objects, institutions and practices' and how this can inform us on the production and control of knowledge (Knell, MacLeod & Watson 2007: 28) and 'how museums change and are changed'. Museums physically can often fit the stereotype of the large building with a colonnade, like the British Museum and the Ashmolean, but as Hooper-Greenhill says, this actually 'bears very little relationship to the range and variety of museums that exist' (Messias-Carbonell 2012: 517). The physicality of the museum environment makes a bold statement, meaning that physical and cultural change needs to have multiple approaches and understandings in order to work effectively and have significant impact. Black highlights this by stating that 'we need to enable our users to engage with the cultural memory of humankind' and that this is essential in order to create the identities of both the individual and the community (Black 2012: 8). As Watson states, 'museums are expected to be responsive to their audiences and to justify and actively develop the roles they play in society' and it is important to note that Watson states how both museum visitors and staff will vary in that some find it exhilarating, while others do not (Watson 2007: 27).

Throughout this chapter, I will consider the philosophies, approaches and methodological aspects of collating data in order to answer these questions and explore these areas (Denscombe 2010: 116). I am using case studies and research

approaches that will enable qualitative data collection and subsequent analysis. It is important to explore and understand the choice of research strategy and data collection, as well as analysis methods with reference to theory as well as the differing views which lead to qualitative research, all of which is essential to an appropriate research design (Bryman 2015: 40). Throughout the research processes, I will consider in more detail the theory and practice of each step, which will inform the research approach; case study design; preparation of data collection; carrying out collection for the case studies and subsequent analysis of data and reporting (Creswell 2012: 44). Through case studies, the intention is to understand better the challenges and processes involved in museum capital projects, and also investigate questions such as how museum projects to produce exhibitions operationally provide public access to collections and be relevant to their communities (Black 2012: 241). The issues that museums face in the twenty-first century include ensuring that they are relevant for their communities and their expectations in terms of social, economic, and political perspectives (Watson 2007: 19). Many organisations, that undergo significant change, often have a PESTLE analysis (Political-Economic-Social-Technological-Legal-Environmental) so that they can fully understand the position and role of the organisation in its environment. It is a business analysis tool that is used to track the environment and keeps an overview for the business so that they can know how to adapt their product and when to launch it (Pettinger 2012: 25). This could also be used in a museum context, as museums are affected by their environments and the changes in them. With capital projects, the new entity being created (gallery/building etc.) is ultimately a product for the visiting public and other stakeholders. What I am interested in are the project management processes and how the museum gets to that final product. The museum project examples I am using did not use a PESTLE analysis approach, and it would be interesting to see if this type of analysis could be used to explore the project aims and end results.

## **Research Design**

The research design for this thesis is located within a qualitative approach through case studies, supported by museum documentation and new interviews that I will carry out for this project. This involves in-depth inquiry, interviews capturing relevant

staff members' perspectives and experiences (Quinn Patton 2002: 40). These quantitative approaches, which can also be referred to as a 'positivist' approach, rely on the assumption that the method is able to bring out the truth or able to quantify a claim. This type of measurement is meant to bring about results that are 'reliable, valid and generalisable in its clear predictions of cause and effect' (Cassell & Symon 1994: 2).

### **Research Process, Methods, and Data Sources**

In order to approach this projects from multiple angles, data should come from more than one source. In this way, it is more likely to get a broader and fuller perspective on the overall project. It can also help towards ensuring an understanding of what made the processes and the overall project successful or not. The approach I took included using the official published material from the projects, and also included interview material from museum senior staff members to understand how and why decisions were made from a project management angle. I collected data for the case studies of the museums I wanted to research and learn more from. Through these cases studies, it is also possible to test the theories from the literatures review exploring organisational structure and culture, and project management. The museums that I am using are the Ashmolean Museum of Art and Archaeology (Oxford), the Victoria and Albert Museum (London), the Imperial War Museum (London), the Ashmolean Museum Broadway (Independent Museum in Cotswolds), and will include contributions and connections to other projects including the Museum of the Order of St John (London), Museum of Oxford (Oxford) and Compton Verney (Warwick). Collating data through interviews with senior staff involved in each institution, the written materials for the projects will bring together a body of primary research data that I can develop into the cases studies. For the sample size, I carried out twelve interviews with senior team members who are connected with members of the museums mentioned above, as well as individuals who are involved in museum funding and facilitation. The reasons I have chosen to develop case studies of these museums is because they have undergone a major capital project(s) and because they represent particular types of museums: national museums, a University Museum, an independent and a local authority museums. The commonalities throughout these

projects in different types of museum include the word and identification of 'project' in order to carry out change, physical and organisational. They also all share similar, if not the same, funding streams for their projects. The projects themselves vary in size, scope, and proposed outcomes, but there are areas and methodologies which are very similar. Both the difference and similarities are interesting when developing case studies. This is because there is no one way to do a project, and through the case studies, it should be possible to see the various approaches and pitfalls to avoid in project management in museums. Janes refers to Stuart Hall's point when writing about organisational change. Hall said that the narratives should be searched for what is not included 'its silences' (Janes 2013: 7). By looking at the patterns throughout, the gaps between can often become clearer. By thematically coding the interviews, analysis of this primary data can illuminate that which is not said and assist in accurate and broader analysis.

The differences and commonalities for the projects I have chosen also include the fact that I was the/a project manager in some of them. This means that there will be differences in analyses of the projects as some of them will be looked at and partly assessed through personal perspective and be anthropological in methodology, because I, the researcher, was involved in the project. The others I will be assessing from the outside, which is fundamentally different. Autoethnography is qualitative research in which an author uses self-reflection and writing to explore their personal experience and connect this autobiographical story to wider cultural, political, and social meanings and understandings. In doing so, the 'tension' between the insider and outsider perspectives is confronted (Adams, Jones & Ellis 2015: 1). It is important to consider and accommodate how this might impact upon my impartiality when I was involved in the projects. My involvement affects the way I see the project and the tasks, progress and outcomes etc. Like any scientific experiment, it is essential to accommodate and consider any areas that could create varying or anomalous results. Because the case studies will need various approaches and considerations with methodology, such as autoethnography, because I was involved in some of them and not others, this could create a variance in the 'results'. By taking this into consideration when developing my methodological approach, I can accommodate the

potential variances when comparing case studies. The only common thing between them all is that they are museums. In addition to that, they are different 'types' of museums, they are different sizes, with different sized projects and different project approaches. Also, each of the projects in different types of museums are funded in different ways with combinations of funders, which seems to follow a pattern with their museum type. There is a certain extent to which the variances in approach can be controlled and will need to be kept in mind when drawing conclusions and theories from the results. The positive and strength of having a personal and 'insider' insight into some of the projects is overall a strong point. Being part of these projects enables me to have an invaluable insight into the day to day practices of museum project management, which is rarely recorded, as well as the more visible decisions and actions available to all researchers. This also means that I can use a reflexive approach when investigating and researching the case studies of different projects. I began my research after I had completed these projects and, therefore, I can consider myself and my experiences from the perspective of a participant, rather than a participant observer. I was given permission by the Ashmolean Museum to write about my experiences while I was employed there, and all of the senior staff are also part of this thesis as they are part of the interviews.

Project management practices are well documented and taught, and the reports of museum projects are carried afterwards. There are also opportunities to see how decisions were made, what influenced them and also who made them, rather than just the outcome of the project at the end. The journey and how it was travelled is also very important in the understand project management in a museum environment. This insight is not available to all researchers and if used appropriately, it can be a real strength to my research and understanding of this area in museums. The knowledge of the actual practices, mistakes and lessons learnt etc. are essential in order to gather as realistic an understanding as possible. By knowing the practicalities of creating and carrying out projects, my lived experience is in fact a bonus and one of the main reasons I wanted to carry out this research. By putting it into the wider context of other projects and learning from those experiences, approaches and also directly from some of the people involved in them, it is possible to ensure that the overall

understanding benefits from a broader, more critical assessment and research-led approach based on theories and practice within a museum environment.

The literature review highlighted particular areas of theory that I wanted to explore with the case studies. The main aim of my research is to explore the way in which museum projects are different from or similar to other projects, how museums as organisations operate, change and survive. By exploring the current practices related to projects and identifying key theories, I intend to investigate how museum projects are currently managed and whether project management theory from other areas (PRINCE2, construction, IT project management etc.) is relevant and how, if applicable, this can be applied in a museum environment. The literature review highlighted that there are different approaches that museums take in order to carry out change, and there could be correlations between the practice and the organisation type. In order to explore this more, I will look at organisation types and project management methodologies through the case studies and interviews. By gathering qualitative data and investigating through the case studies, my intention is to understand better the processes of projects within different museum environments.

One of the research aims is to review and research museum projects and how they work, and bring together ideas as to how museum projects can be managed more appropriately in the future. In order to do this, it is necessary to also understand if they have been successful or not in their aims, which can be done quantitatively (did it go over budget? Was it completed on time? Was it received well by its audiences – did audience numbers increase and was their feedback positive?) and also qualitatively (what effect did the project have on the organisation structure and culture and how can this be observed and identified? How many of the staff remained in the institution after the museum reopened and how were roles different in the new museum?). I am not planning to investigate the success of the redispays in terms of their educational or aesthetic appeals, although I have referred to audience research by the museums where available, but this is to understand the main aims of the museum when planning to carry out a capital project. By exploring these aspects, my aim is to identify commonalities and differences in museum capital projects from the last twenty years,



and understand why they were successful, or not, and how this can inform museum projects of the future.

In my research I took ethical implications into consideration and followed the guidelines set out by the institutions in which I worked and those of the University of Leicester (Leic 1). I also adopted an open-minded and self-reflective approach, and objectivity has also been addressed. It is important to understand the biased nature of my role as a researcher and also autoethnographic approaches involved due to my role in the projects that are part of my research. I need to acknowledge my role as part of the research approaches, and consider any vested interests, social values or aspects of my self-identity as the researcher (Denscombe 2010: 81). By carrying out research, the methodology will be underpinned by philosophies and theories when exploring my research hypotheses.

Qualitative research uses theories and frameworks to inform how the research is gathered and interpreted, using inductive and/or deductive approaches to identify patterns, and the results can include the voices of the participants, and enable to the researcher to be reflexive (Cresswell 2012: 44). Discussion of the research approach is needed in order to explore the aims and objectives of the research, and work out what approach would be most appropriate. There are several approaches which are commonly used and they have clear and differing remits. Deductive, inductive, and abductive research approaches are very different in their aims and can be used in different ways depending on the main aim of the research (Cresswell 2012: 22). The relevance of hypotheses to the research project is the main distinctive point between deductive and inductive approaches. A deductive approach tests the validity of assumptions (or theories/hypotheses) in hand, whereas an inductive approach contributes to the emergence of new theories and generalizations. Qualitative research approaches describe the overall ethos of the research approach and the various different stages are areas that this covers. The literature sources I used for my research have included material related to social sciences research projects in particular, so that I can explore the multiple ways in which I can approach the subject, interrogate and analyse it appropriately and in the most sensible way (Denscombe,

Denzin and Adams, Jones & Ellis). MacDonald introduces her volume by expressing how broad a range of methodological approaches there are in museums studies now, which are aimed at fully understanding the museum (MacDonald 2011: 6).

Carrying out research with a deductive approach involves beginning with hypotheses which are then tested through the approach and then accepted or rejected (Silverman 2016: 347). This works well in many research projects and provides a clear way forward for many. For my research, I have started with some hypotheses and I am testing them qualitatively, but there will not be a clear cut answer of 'confirmed' or 'rejected'. My research is more likely to produce a framework of theories and methods that can be used in museum capital projects. Using an inductive approach actually begins with research questions rather than hypothesise, as well as aims and objectives that need to be achieved during the research process. Following the testing, the observation of the findings and observations then lead to theories. This is more relevant to my desired research approach, although I will be able to identify and articulate theories, processes and methodologies that can lead to better practice in museum environments. This approach allows the findings to 'speak' more and play a more direct role in the conclusions following the research. I do not expect the conclusion to be just one way of doing things, as per the deductive approach and the inductive ensures that the research can influence the subsequent theories that are drawn from it. The abductive approach explores incomplete theories or questions or strange things at the beginning, and looks to incorporate existing theory where appropriate and also build new theories or modify existing theories.

My research philosophy can be understood through the lenses of a range of different approaches including positivism, postcritical positivism, realism, pragmatism, interpretivism, constructionism, relativism. When investigating the research methodology, philosophies should also be taken into consideration and explored in order to understand fully the philosophical underpinnings, foundations and assumptions that inform the research approach and methodology. Research philosophy is an over-arching term relating to the development of knowledge and the nature of that knowledge and is a set of beliefs that guide the research approach

(Denscombe 2010: 116). Research methodology is concerned with the specific ways and the methods we can use to try to understand our research better. Philosophy involves how we come to know, rather than the practice side. Positivism is when the researcher is concerned with gaining knowledge in a world which is objective and uses scientific methods to investigate something (Denscombe 2010: 120). Through experiments and similar methods including surveys, quantitative data is created, observed, measured and analysed. With positivism, only things that can be measured, experienced and quantified count, and this does not include a multi-disciplinary environment or considerations of the specific cultures involved in museum institutions and organisations – only things that can be measured. This aimed to get the ‘truth’ and subsequently be able to predict and therefore control the world more. Theories are tested and endorsed or disregarded. As Munslow writes about history as deconstruction, he argues that there are ‘fundamental questions about the character of history defined as the reconstruction of the past according to the available sources’ (Knell 2007: 140). The historian needs to take into account the potential bias, incomplete sources and facts. Therefore, it is necessary to not only do the empirical analysis of the original evidence, but also combine that with interpretation (Knell 2007: 142). The argument is, therefore, that positivism alone is not enough to give as complete a picture as possible. For example, it would not work for my research methodology to follow positivism alone as it would be too limiting and not add the context and opportunity for interpretation. There are aspects that can be quantified and counted, but it would miss all the qualitative elements of the sources. The sources for this research are people and museum environments make people act and work in different ways, focussing on the quantitative elements only would be too basic and reductive. All staff should be included in the development and representation of the museum’s reputation, which includes the Museum Director and all the staff. This is why both leadership and motivation theories are important in museum projects. Staff need to be on board with the museum mission and messages and be trained in how to communicate them (Ambrose & Paine 2012: 108). The values that underpin the professional practices include scholarship, conservation and aesthetics, and should be authoritative and informative (Messias-Carbonell 2012: 517). The research that I am carrying out here is a form of oral history. Just as an oral history project would capture

the testimonials of people who remember certain things from a particular event or period. Access to the oral responses from the community you are studying is really important and necessary for a more complete understanding. Also, the documentation material, combined with the oral responses enable the researcher to construct a 'framework' for the history of the area of research (Knell 2007: 61). This is very similar to what I am doing – attempting to identify and use in my research all those nuances and unwritten cultural understandings of processes and people's actions. Many aspects of museum capital projects come and go and are documented from a logistical point of view, but few others. The reports back to funders are important and cover a wide area of successes. It is also interesting to look at these projects critically and create a framework for the history of museum projects (Knell 2007: 61) and in many ways, the oral testimonies from the museum professionals as part of this thesis is like a historical documentation. It is important to keep in mind that oral testimonies are not always accurate, as interviewees tend to present a version of events in the past that cast them in a positive light. However, with this caveat in mind it is still one of the best ways of discovering the opinions of individuals and to find out some of the unwritten ways in which projects are managed. Oral testimonies, when given after an event, can sometimes provoke reflection and honesty from participants when they consider what went wrong and what was successful. In other words they can be very useful but all this should be kept in mind and they should be put into context with other sources too.

The Interpretivist approach is based on a naturalistic approach to data collection such as interviews and observations. It is a broad term for approaches which disagree with the principles of positivism (Denscombe 2010: 121). Denscombe also highlights that interpretivism can also be referred to as constructivism because it focusses on the difference from positivism. It works on the premise that knowledge is not in fact reality, but it is simply constructed by humans, and affected by social interactions (Bryman 2015: 29). Again, this is where oral testimonies' accuracy should be kept in mind as well as how the interviewees may be influenced and constructed. This is also relevant to museums as infrastructures of knowledge. They are physical constructions and places, and also include ideas, interpretations and representation of objects,

collections, cultures and more. What was believed and defined in the past, may have changed significantly since then. For example, even the definition of science has changed each decade, and other disciplines have developed subsequently as a result, such as social sciences and humanities.

To be able to interpret and represent any culture, community, history, story, it is important to approach the project with the appropriate context and interpretation philosophy. Simpson points out that objects, for example, change ‘culturally, physically and temporally, (as) they pass through different hands, and are attributed with multiple uses and meanings’ (Knell, Macleod & Watson 2007: 244). Philosophy has moved on in some ways since the 20<sup>th</sup> century with a move towards a post-positivism, which has also seen a complete rejection of the main aspects of positivism. It can also be referred to as ‘critical realism’ and recognises that no theory nor approach is infallible (Bryman 2015: 25). It questions our ability to truly ever understand fully, as all theories are revisable, for example. There is a common meeting ground between scientific experimentation and social sciences which creates an interface. Due to the fallibility of all measurements, it is seen as very important to use several types of data gathering, measurements and observations. All are considered to have errors, but between them all, there will be a commonality and with several approaches, it is possible to triangulate findings and bring together an answer and response. Post-positivist critical realism also identifies the biased aspects to gathering data and interpreting it (Creswell 2012: 246). This approach and idea works much better with the multiple sources I will use for my research. The multiple aspect, rather than single line of enquiry, means that the data works together to build a picture and represent what is being investigated in a multi-lateral way, rather than through a method which looks for absolute truths and proof. Knell talks about an object’s reality and how it is part of the context, rather than surrounded by it, and museums fit them into their disciplinary frameworks when they are included in the collections (Knell 2007: 8). Pragmatism can be seen as a way in which research frameworks can use both positivist and interpretivist viewpoints. Pragmatist approach includes believing that there are many different ways of interpreting the world and carrying out research, that it is never in unity, and that there is no single point of view can give the entire picture

because there can be multiple realities (Creswell 2012: 28). A pragmatist approach can include both the inductive (generating a new theory) approach of the interpretivist stance, and also the deductive (testing of an existing theory) approach of the positivist. It can also use qualitative and quantitative bases too, rather than a more heavy focus on just one. Pragmatist approach seems a good way forward for my research because it also focusses on how research also occurs in a variety of contexts which needs to be considered, including the historical, social and political etc. as well as a multiple qualitative approach. Pragmatism is unsure of the philosophical debates between positivism, interpretivism and critical realism, and is more focussed on the practical use of the outcome of the research, rather than fixation on the approach. For this reason, pragmatism is commonly associated with practitioners carrying out applied research (Denscombe 2010: 128). All of these aspects speak very clearly to my area of research and the fact that I am also a practitioner in this area too. The philosophical frameworks which underpin research are fundamental to the interpretation of the results. But the relevance of the outcomes of the research, particularly for my project, are very important and are part of the research aims, in that the ongoing interpretation, study and research into museum projects can then lead to recommendations and application of improved practices and increased positive outcomes for the museums themselves.

Relativism believes that being objective in your research approach is not possible, because it is impossible to remove your values and objectivity is actually an illusion (Denscombe 2010: 89). Relativists believe that different people can have differing views of what is wrong and right in a particular situation, and that there are no absolute truths at all (Blaikie & Priest 2017: 169). With this type of thinking, it means that we are not able to truly understand each other. It is also particularly important to keep in mind for oral testimonies, as these are very personal accounts of something. In the interview process, I will keep the questions semi-structured and a consistent approach where possible. The responses are interesting and important because they are personal accounts from the staff who were responsible for the main decisions and leadership of the project. As already discussed, oral testimonies cannot be completely accurate, and as relativists would outline, they are not able to be objective because it

is impossible to remove your own ideas and values. However, the personal responses from the staff involved in the project are rarely recorded in official reports and are often lost once the project is completed. Therefore, their inclusion in this research and thesis is important, because they give a snapshot of the responses of those individuals, many of whom have retired, moved on or sadly passed away. This way, their voices are heard, recorded and woven into the analysis along with the other sources.

Perceptions and understandings are subjective and there is never one true perfect way, which suits the approach I am using for my research. Munslow argues that there is an almost universal rejection of positivist constructionism and there is doubt from most historians that historical explanations are really objective interpretations, cast in a narrative form (Knell 2007: 134). Essentially, it is the case that historic sources are already biased and raised into a different environment because they were chosen to be recorded by the people of that time, and then historians come to them and interpret them again. This does not mean that relativism is the only way, as narrative plays an important part in explaining history. This can also be translated into museums and reading evidence in other situations. By assessing the data for this project, there will be areas that are well covered, but there will certainly be situations where evidence is not always possible. Written records are already filtered and interpreted documents. The raw empirical data can be gathered through interviews, but will also include a broad narrative when looking back on something they have been through. This is why a semi-structured interview is important so that their opinions and responses can be accurate, deeper and challenged through additional and follow-up questioning (Denscombe 2010: 47). Through case studies and interviewing people, I intend to explore my research questions through different avenues and create a multi-lateral view. I will be able to use a multiple research approach that investigates the case studies both emicly (being within the projects myself) and eticly (looking from the outside at the projects) through observation, interviews and through an autoethnographic methodology.

### **Research methodologies**

A research project methodology should ensure that the data that is collected is valid,

reliable and as accurate as possible, using a justifiable methodology (Denscombe 2010: 160). By interviewing people to collect data and developing case studies, I will be able to combine action research, grounded theory, autoethnography, and archival research. In order for research to produce reliable and valid data, the methods need to be appropriate for the research involved and have an understanding of the theories and concepts that underpin them. All of this combined should address whether the research has asked the right questions, if the data is sufficiently precise and detailed, and if the procedures used for the data collection could distort the findings (Denscombe 2010: 141). The accuracy and therefore relevance of research is a primary concern for all researchers and certainly for those assessing the research too. The right sort of questions being asked is important and it is necessary to ask them with enough detail and precision in both qualitative and quantitative data. The case studies will include new qualitative data from interviews and will also be backed up with written records relating to the capital projects to ensure validity, accountability and give a wider context to the interview data. There are a wide variety of methods that are common in qualitative measurement and approaches which include interviews and observation, which can be participatory or objective. Assessment of the final methodologies to be used should be based on ensuring that they bring about relevant, feasible, objective, accurate and original results for my research (Denscombe 2010: 161).

Alternative methods of data collection I explored included questionnaires and focus groups. The advantages would be that I would have more data and be able to contact more people involved in the project. However, the purpose of the research at this stage is to explore in depth with a focussed number of case studies and individuals, so that I can understand and investigate the mechanics of the project management method, the management decisions and organisational leadership before, during and after. Personal interviews also support a more reflective approach and discussions, as well as a more intimate view of past projects from the interviewees. Rather than just the facts, the outcomes, and the more black and white understanding of what the project was, this reflective approach enables me to gather a more personal and contemplated response and view of the past events. While being responsive, it will



also provide a chance for a more self-critical response and comprehension of the project processes, activity and outcomes. The questionnaire would be aimed at all staff so that I could look at how they felt about the project, their role before during and after. It would need to be done thoroughly and ideally I would want to find a museum which is about to go through a capital project and do some baseline assessments and questionnaires with staff and then also during and afterwards. For this reason, I decided to not use questionnaires and focus group methodologies at this stage, because one-to-one interviews, observation and written records is more appropriate for this current research project. Once this research is complete, a natural next stage would be to not only expand what types of museums are included and number of case studies in those categories, but also the people interviewed as part of the data collection. I would also like, in a follow-on project, to look again but interview the people who worked on the project on short-term contracts. By this, I mean the staff who were brought in specifically to work on the project and were paid from the project funding. A long term issue in museums is job insecurity and the change in roles in the museum profession.

“the growth in museum employment is not only due to the creation of new museums, but also includes the increasing complexity and specialisation of museum work internally in relation to the traditional curatorial and collections management duties of collection, conservation, exhibition, and research”

(MacDonald 2011: 417).

With the development and success of museum studies courses since the 1970s in Europe and North America (MacDonald 2011: 164), there are a greater number of people who are qualified with a masters or doctorate in Museum Studies. This field is naturally interdisciplinary (Messias-Carbonell 2012: 6) and those that study it come to it from different professions, backgrounds and academic practices, rather than a traditionally single discipline collections focus. With the rise of funding for capital projects, there is an increase in short-term opportunities for museum professionals. My research aims can be explored by investigating museum projects through case

studies, which will understand more about the projects in the museums, and also the theory and methodologies of project management.

### **Case Studies**

A case study is an intensive study of a specific individual, phenomenon, place, situation or specific context. By using empirical enquiry, a case study can be used to investigate a contemporary phenomenon in depth and also within a real-life context. Yin explains that this is particularly important when the boundaries between the phenomenon and context are not clearly evident (Yin 2009: 18). There is no one way to conduct a case study, and it is more common that a combination of methods, such as interviews, direct observation etc., are used to create it (Bryman 2015: 67). The use of case studies to develop and test theories in the social sciences has increased in recent years and the research literature highlights the fact that a more rigorous process and analysis should be conducted on case studies (Denzin 2011, Bryman 2015, Silverman 2016, Creswell 2012, Blaikie & Priest 2017). Case study research is able to help us create an understanding of what is being studied and can extend the knowledge, as well as add strength to what is already known through previous research (Denzin & Lincoln 2011: 301). Case studies emphasise detailed contextual analysis of a limited number of events or conditions and their relationships and researchers can use the case study research method across a variety of disciplines. This feels relevant to this research project as it creates a multi-disciplinary approach. Social scientists regularly use this qualitative research method to examine contemporary and 'real-life' situations to provide the basis for examining theories, ideas and methods (Denzin & Lincoln 2011: 116). Case studies can often be based on smaller samples, and, therefore, some generalisations on the research are made. This is widely accepted by positivists, pragmatists, interpretivists and realists, as long as the limit to what the data can say is recognised and that representation and generalisations of complex issues is understood and taken into consideration. By adopting this basis and carrying through into the approach, the relevance and transferability of the findings is clearer (Denscombe 2010: 194).

Case study research is not a completely linear process, and should respond to the

content and rotate back from the design stage to the planning, analysing and collection, in order to respond to the research data and aims (Yin 2009: 2). There should be multiple sources of information that form part of the case study, which means that there are more variables to control, but also broader context to assess the 'how' and 'why' questions that form the research aims. Using case studies can be seen as one of the more complex ways to research a subject, but is necessary in order to fully understand the context, phenomena and historical and current outcomes of situations (Yin 2009: 3). The validity of the results by using this research methodology will be challenged and traced back through the rigid research methodology. Acknowledging the strengths and weaknesses of this approach will be accounted for and enable the data to be used in a reliable form. Case studies are often used to help fully understand complicated social phenomena. Museum environments vary greatly, as do the capital projects within them, which means that case study approach enables the in-depth analysis of the common aspects across the examples, as well as the differences, which will also tell us something significant in itself.

Anthropology is an invaluable methodological tool in this context. Using anthropological practices in a museum studies thesis will enable me to better understand the relevant anthropological aspects of the research area. I am looking at capital projects, which often includes the physical construction of new buildings, there is also the 'people' aspect of museum environments which can be involved. The culture of the museum organisation, much like many institutions, can be seen to have its own ways. Organisational theories explore how organisations are societies and communities, rather than machines. Handy describes the voluntary world as always having known that organisations are living communities with a common purpose (Handy 1990: 21). For museums, this is particularly important because museums are often not stable in terms of job security and low wages, and many people want to work in museums, so the job competition is high too. The community aspect and staff belonging to the common institutional cause is very important to them, since they are often on low pay compared to similar roles other industries. The anthropological interest is therefore important when exploring museum institutions, the role that capital projects and, ultimately, change has on the people. Museums are buildings,

often with collections, but they are also buildings and collections created and looked after by people.

Anthropological theorists have developed four main branches: cultural, biological, linguistic and archaeology, and each looks at a different set of research interests and techniques. Areas that are investigated in this field include culture, language, or human biology and evolution (Poutney & Maric 2015: 274). Franz Boas is considered both the founder of modern anthropology, who operated during the later 19<sup>th</sup> century and early 20<sup>th</sup> century, and it was Boas who gave modern anthropology its scientific methodology. Boas originated the notion of 'culture' as learned behaviours (Andreatta & Ferraro 2014: 76), and through an anthropological range of methodologies, I intend to understand the organisational culture, structures and, behaviours of the museums involved in the projects. Boas also believed that the best way to understand cultures was to attempt to integrate yourself in the group in order to understand how to view the world from the perspective of a member of that society. The knowledge I have through my experience as part of a major museum capital project is a first-hand account of actually carrying out the activity. According to Poutney and Maric, the data that comes from anthropological methodologies is rich and qualitative, as information about the group can be understood through unstructured interviews, direct observation, participation, and looking at documentation that relates to the group too. This is very similar to my approach to understanding the projects. By using these different methodologies, I am then able to tap into the various different aspects of the museum project and create a new or a broader and deeper viewpoint.

Ethnography is a very important qualitative research method that can often be associated with observation and study of different cultures, but can be used in the study of much broader terms for any group or organisations. Ethnography is a qualitative method that has an interpretivist base with the broad understanding that this, like other qualitative approaches, has a philosophical basis which aims to explore, describe and contextualise the social understanding and experience of something (King & Horrocks 2010: 11). Ethnography is the method which is most commonly used by social and cultural anthropologist to observe and collect qualitative data (Ferraro &

Andreatta 2014: 17). One of the methods used in ethnography is observation fieldwork and it is something I could have done for my research, however, I have the extra layer which is that I was part of the groups and I am using my own experience of being a project manager on a major capital project. But ethnography is a very broad area and involves many different practitioners and methods. Ethnographic research involves observing people in their natural, real-world setting, rather than in the artificial environment of focus groups or new locations. The aim of this approach is to gather an insight into how the people live; how they make and use things; activity in their everyday or professional lives (Poutney & Maric 2015: 274). Observation is the most common ethnographic approach and is part of field research. The ethnographer is completely immersed in the culture as a participant who is active, but also records extensive notes. I am not convinced that the ethnographer can be completely immersed in the culture while also observing and taking notes, as their behaviour in doing this must affect how the rest of the group behaves in response. Shelton talks about 'academic isolation' when discussing museum ethnography and the way in which he described the 'intellectual bankruptcy' more evident than in the long periods of time it took for the academic narratives to percolate down into the physical displays (MacDonald 2011: 72). The description of the academic narratives moving 'down' to 'inform' the displays shows the many stages at which the interpretation can occur. Observing and being a participant is possibly a way to go beyond this, but it can be a demanding method for collating data, though it is also one of the most common methods for qualitative data collection. In real terms, it involves the researcher becoming a participant in the community or context being observed. It is emphasised in literature that the participant needs to embed themselves within the entity being observed and studied, and they need to know how to enter the context, and then continue the role of the researcher as a participant and collate and store the field notes, and the analysis of field data (Bryman 2015: 267). This kind of observation as a participant often requires months or years of intensive work, due to the fact that the researcher needs to become accepted as a natural part of the culture in order to ensure that the observations are of the natural phenomenon. However, how this can ever be possible is debatable and should more realistically be accounted for in the interpretation and analysis of the results. This also suggests that being part of a group

enables a person to understand all aspects of the group. Everyone has their own identity, and as Black says (Black 2012: 8) the identity of the individual and community can be both the same and also different. There is also a direct observation technique which is different from participant observation where it does not involve the researcher becoming part of the entity/community being observed. However, the direct observer tries to be as unobtrusive as possible so as not to create a bias in the observations. Also, direct observation suggests a more separated and detached perspective, where the researcher is watching rather than taking part. Therefore, it is possible to include technology, such as filming or digitally recording in some way, to be a useful part of direct observation process (Denzin & Lincoln 2011: 715). Direct observation is more focussed than participant observation, because the researcher is observing certain sampled situations or people rather than the multi-level approach of becoming immersed in the entire context. Direct observation also does not take as long as participant observation, as the period for the participant/researcher to be embedded will take some time. Field research differentiates between emic (from within) and etic (from the outside). While being aware of the limitations caused by my part in some of the case studies, the research will benefit from the deeper understanding of the practicalities of projects in museums. I will also be using interviews in order to gather information about other projects.

This methodology is also sometimes used by archaeologists and biological anthropologists for certain issues that require data from living people or people living in a natural environment, which could include pottery techniques, techniques for growing crops etc. Anthropology and the study of peoples through ethnography can bring to light commonalities, differences, wider understanding and appreciation of other communities and cultures. The narratives and representations of these cultures are included in displays of material culture in exhibitions, which is often part of a capital project in a museum. It is important that anthropology is part of the approach, and if possible, also the inclusion of the people from that culture as part of the process. This is often built into museum projects, where they are potential 'agents' for social change and differentiation and representation (MacDonald 2011: 15). The aims of museum capital projects, whether they are big or small, can include the

engagement, inclusion and representation of the communities linked to the collections and displays. In the case studies, I will explore how 'successful' the engagement can be, particularly when it is linked to project, and therefore time-limited, funding. Autoethnography is the study, self-reflection, and 'observation' of oneself when in a natural environment. I have included, in particular, literature related to autoethnography because for some of the case studies I was involved in the projects and also the project manager for some of the material discussed. Autoethnography is a significant, fairly new, area of research methodology which can enable the researcher to use their own experiences (Adams, Jones, & Ellis 2015) to describe and critique practices, experiences, cultural and wider beliefs etc. The difference between autoethnography and ethnography, which is used by a wide range of disciplinary researchers, including anthropologists and sociologists, is that autoethnography acknowledges and identifies the researcher's subjectivity, rather than trying to lower the risk and limit it, which would be done in other traditionally scientific empirical research. Autoethnography is seen as a form of ethnography, where autoethnographers are the primary subject of the research in the process and includes writing stories and personal narratives. The idea is that autoethnography enables the researcher to include themselves in the research, and also allow for the bias and identity to come through, but has raised concerns in the area of identity politics (Adams, Jones & Ellis 2015: 14). The first reference to the term 'autoethnography' goes alongside the identity politics of the 1970s. In 1975, the term autoethnography was used to describe research studies where cultural members write about their own cultures. Interestingly, in 1977, Goldschmidt, former professor of anthropology at the University of California in Los Angeles, proposed that all ethnography is in fact 'self-ethnography' because it is all focussed around the self and reveals 'personal investments, interpretations, and analyses' (Adams, Jones & Ellis 2015: 16). In order to understand and assess qualitative research, theories of autoethnography will enable me to interpret and understand the research value and my role in the case studies I was involved in. It will, most importantly, enable me to both describe and analyse my personal experiences as well as understanding how this affects the research process. It is important that I address my role in the case studies, due to my previous jobs in museums as a project manager in the UK (Ashmolean Museum) and internationally as

a project management consultant. In this thesis, I am focusing on UK museums because this is where I have the most in depth access to museum case studies and the people involved in them. Autoethnography is a qualitative research method that allows the author to write in a highly personalised style, self-reflection and enables the researcher to use their own experience in their research. This is important for me to explore properly as it would allow me to draw on my work experience also in order to extend understanding about the case studies and from the perspective of a project manager. Being able to be reflexive and use my voice, where appropriate, in these case studies is really important I believe so that the cultural research and context can be widely explored. This type of fieldwork enables the researcher to gain first-hand experience of the situation, but, like all processes, it cannot be without its biases, as each person's interpretation and understanding is subjective.

By the 1980s, there was more of a movement towards researchers being encouraged in the areas of writing personal narratives, and subjectivity and reflexivity in research. Throughout the next decades, it was referred to as an 'alternative' ethnographic approach, and by 2000s, essays that included autoethnography were included in the revised versions of the *Handbook for Qualitative Research* (Adams, Jones & Ellis 2015: 19). What seems to be common in publications in favour of autoethnography (Adams, Jones & Ellis 2015, Denzin 2014) is that it is an opportunity to highlight and include personal and individual responses, rather than a researcher writing about 'others'. However, autoethnography has been criticised because the contribution is unrepresentative and lacks objectivity, and can become too biased, personal and emotional. Ultimately, autoethnography relies on the credibility and training of the narrator (Denzin 2014: 69-70).

### **Main Research Aims**

The main research aims for this thesis are to review and research museum capital projects and how they work, as well as understand how museums act as organisations throughout this change and if there are ways in which this knowledge can be used to improve project management in museums.



Shelton says that museums are more closely linked and connected to the discipline of anthropology and explains the subject area in terms of specific types of museums, such as anthropological or ethnographic museums (MacDonald 2011: 64). The title of the museum can not only influence the visitor but also the collecting practices and approaches of the museum staff too. What I am interested in is anthropological and, where possible, ethnographic methodologies and theories in all types of museums, whether they are 'of that discipline' or not. This would be particularly interesting to explore in museum projects, so that the culture, understanding and approach of that organisation can be more thoroughly understood. For my research, being able to understand how leaders established and carried out projects is fundamental to studying them, and the methodologies linked with anthropology are an essential part of that. Also, interwoven into the study is my role as a project manager within some of the projects themselves, and being able to represent them authentically and realistically can be done through acknowledging and understanding my specific standpoint within the context of the project. By taking into considerations the methodologies and theories of anthropology and ethnography as a whole, as well as autoethnography, the research will benefit from more in depth representation of the projects. Wherever there are humans, there are opportunities for bias and misunderstanding. Using research methods that understand and accommodate for these is important to creating a solid and reliable picture of the material being studied.

Another qualitative approach is phenomenology, which focusses on people's subjective experiences and interpretations, and enables the phenomenologist to understand how the world appears to others (King & Horrocks 2010: 19). Hooper-Greenhill talks about the way in which Lawrence spoke on the papers collectively published by the Science Museum and how they used a collective approach to museum visitor studies, which was seen as independent of theory and also is now seen as an out of date approach to social studies (MacDonald 2011: 372) and that interpretive social theories, including phenomenology had developed. With the research I am doing, it is necessary to see how certain things seem to other people, as project management is ultimately managing people and activity. In order to communicate well, knowing how others perceive certain things can ensure that the

most appropriate approach is used. But with project management methodologies, they are not always structured in a way to facilitate this subjective approach, and also, which is relevant to museum and cultural environments, they are often not particularly well suited to developing a creative collaboration or synergies. In project management terms, the creative part of the process can be 'designed' into the overall programme. However, by its very nature as being creative, the definition of its parameters and timeframe can be harder to contain, as there are more unknowns (Berkun 2005: 113). But, these also are often the periods and aspects of a project that can add the 'wow' factor, although giving more time for this will also cost more money and, of course, extend the timeline of the project. This again highlights the contrast between the 'creative' environments with standard project management process, where all risk is managed as much as possible and the focus is on the time and cost of the project. It is the linear journey of most projects that does not match a creative space, as the connections are multiple and multi-directional. The strength of a museum lies in its role and its ability to change, albeit slowly, in order to ride the political, social and economic changes of the environment in which it sits. "Museums are ever changing, adapting to the pressures of the society in which they exist and which they seek to serve" (Watson 2007: 27).

### **Data Collection**

Museum organisations are a mixture of theory and practice and, therefore, fieldwork and gathering of primary data in addition to the written records that come from projects, can form a good basis for a research project. All research incurs the risk of anomalous results and this needs to be accounted for as part of the theoretical approach. Understanding the theoretical approach means that the approach and methods are grounded. Grounded theory is itself a qualitative research approach from the 1960s which means that the theory itself is grounded in observation and is an iterative process where the data is gathered and rather than testing and confirming it, the work evolves towards one core aspect that is central (Silverman 2016: 347). Grounded theory is often described as a post-positivist philosophy, and brings about a relevance that positivism does not have (King & Horrock 2010: 19). What is particularly relevant to me and my research in this is the way in which the analytical strategies go

back and are altered according to the needs of the research. When gathering the data from the interviews, and analysing them initially and noting the themes that were coming out across them, I noticed that there were particular patterns and regular aspects throughout. Looking across the first set of interviews I carried out, I identified that it would be beneficial to carry out a second wave of interviews in order to cover areas in the data set that I considered to be missing at that point. Therefore, I went back and approached three further museum professionals from three different museum projects and carried out the same semi-structured interview approach to gather further data.

### **Interviews**

I have been able to study the process and methodologies of project management through documentation and literature in many cases, but in order to understand the people instigating and leading the projects, I interviewed them directly, recording the conversations for my own research purposes afterwards when writing up, and also taking observations on their reactions and body language during the interviews. One of the positive points about interviews is the chance to ask questions, to get to know the person you are talking to, and to observe the answers, rather than just reading them. The potential negative, which needs to be taken into consideration and also mitigated as much as possible, is the way in which the interviewer can influence the answers of the interviewee. The reason I chose to use interviews as a method of gathering data is because I have the printed evidence from written records, and the responses and reflections of the people involved can add a wider and different perspective, as well as additional information that may not be available in official written documents.

The ability to gather primary data for my research is dependent on gaining access to the appropriate people within the museums. How appropriate the individuals are relates to the research question, related objectives and research designs. To be able to add the appropriate information, I aimed to reach the decision makers in the institutions on which I wanted to do case studies. I began with selecting the museums and projects that I would use as part of the case studies and then established how to

access, make contact and select participants. Navigating the hierarchy and protocols of the museums in question was something important to consider, as well as setting up an appropriate environment in which to interview the person (Seidman 2013: 50). This is important in order to create a space in which the interviewee can respond honestly, comfortably and accurately without influence. The 'normality' of the setting is how this is described by Denscombe so as to ensure that the research is not intrusive and does not disrupt the normality, as this will create distorted results (Denscombe 2010: 149).

### **Choosing interviewees**

The main aims for the interviews were to add the personal accounts of the people in leadership roles, in addition to the written records and publications about the projects. Interviews are a good methodology for gathering qualitative data and increasing the level of detail gathered on a subject, as well as the personal reflections of the individuals as they look back on the project. Also to hear more about the personal decision making processes and context that influenced those decisions and behaviours.

As the aim of the research is to look at projects across different museum types, it was important to reach out to people who had been part of projects in different types of museums. For this thesis, I wanted the main decision makers from within the museums, which is why I focussed on the museum senior staff. I was also in a position to make direct contact with many of the interviewees because I had worked with them in the past. It is a big commitment for someone to give an interview, and with the 13 people interviewed, there are almost 20 hours of interviews. Therefore, it is important to highlight the level of commitment from the interviewees, as well as ensure that the questions asked are directly relevant to them and their roles, in order to make the most of the opportunities to speak with them.

It could also be potentially difficult for some people as they are still working in those environments and doing an interview is a personal account, which may make some people uncomfortable. Of all the people I asked to support me in my thesis by giving

me an interview, there was only one person who refused and is not included here. They were part of Phase 2 and not essential to the research area, so it was not an issue from my perspective in the research project. However, it does show that there are sensitivities in this approach to research which should be accounted for in the research design and ethics approval stages. All of the other interviewees were extremely generous with their time, their stories and reflections and very interested in giving their take on my research questions. For several of them, the process seemed to be something like a therapy by looking back on something as large as a capital project, and reflecting on their decisions and what they would do differently if given the chance. I was also surprised at how freely the group spoke overall, and they were not afraid to constructively critique the projects they were part of, showing that they recognise that with such large projects, not everything goes right or as expected. In experience, this is the case and it is therefore more important to ensure that the project is properly managed.

For the interviews, I recorded them and took notes throughout. Afterwards I studied the notes and listened again to the interviews, as well as drew out the overall commonalities and key differences. Following this first phase, I identified some areas where I needed some further museum examples and arranged a second round of interviews.

### **Pilot Phase**

Since 2014, my full-time role has been leading an interdisciplinary research centre in the Humanities at the University of Oxford ([www.torch.ox.ac.uk](http://www.torch.ox.ac.uk)). While I was working on my literature review and planning the research design for this thesis, two (ex) National Museum Directors (Neil MacGregor and Martin Roth) were in Oxford speaking at events. They were interviewed on subjects related to the topics of their talks and also organisational questions related to the Museum-University research dynamic. This provided a good opportunity to explore the broader themes related to this thesis as well as to the broader discussion of research relationships in museums and Universities. Although this does not fit the structure of the research design directly, there is material in these interviews (available online) that both supports and

highlights gaps in the theoretical and practical aspects of projects in museums, and is therefore, useful for the overall narrative of the findings.

These are in the public domain on the following links:

|   |
|---|
| Martin Roth – previous Director of the Victoria and Albert Museum:  |
| <a href="http://www.torch.ox.ac.uk/martin-roth-interview">http://www.torch.ox.ac.uk/martin-roth-interview</a>       |
| Neil MacGregor – previous Director of the British Museum  |
| <a href="http://www.torch.ox.ac.uk/interview-neil-macgregor">http://www.torch.ox.ac.uk/interview-neil-macgregor</a> |

## **Interview Phases 1 and 2**

### **Phase 1**

Once the research design had been developed, and the ethics approval process through the University of Leicester been completed and approved, the next phase was approaching the individuals and carrying out the interviews.

The first phase involved six senior museum staff, three of whom were from the Ashmolean Redevelopment originally, two from the Victoria and Albert Museum and two (in one interview) from the Imperial War Museums. Overall, these three museums have collectively undergone around £200 million of capital projects in the last ten years.

This first phase gave some very rich data, with interviews taking 1-1.5 hours each, and initial analysis and thematic coding illustrated that there were both commonalities across the interviews, as well as differences depending on the type of museum the interviewee was from. This led me to realise that a further round of interviews, with additional interviewees was necessary in order to explore these themes (museum as an organisation, staff, audiences and stakeholders) further and test the theory that there were differences based on the museum type. It also provided an opportunity to add in individuals who did not work directly on capital projects, but had other museum sector and project experience which would be useful to also test the theme and theories explored thus far.

**Figure 8: Semi-structured Interviews – Phase 1**

| <b>Interviewee &amp; Museum</b>                                  | <b>Position</b>  | <b>Reason for inclusion</b>   |
|--|--|---|
| <b>Christopher Brown</b><br>Ashmolean Museum                     | Director until 2014  | Initiated and led the Redevelopment                                   |
| <b>Nick Mayhew</b><br>Ashmolean Museum                           | Deputy Director<br>(Collections) until 2013                              | Led on design, collections during Redevelopment                       |
| <b>Robert Thorpe</b><br>Ashmolean Museum                         | Deputy Director<br>(Operations) until 2013                               | Led of operations during the Redevelopment                            |
| <b>Mark Damazer</b><br>Victoria & Albert<br>Museum               | Trustee, Victoria and Albert<br>Museum since 2011                        | Oversees Victoria & Albert<br>Museum, advises Director                |
| <b>Mark Jones</b><br>Victoria & Albert<br>Museum                 | Director until 2011  | Oversaw 10 years of<br>capital projects                               |
| <b>Diane Lees and<br/>Vanessa Rayner</b><br>Imperial War Museums | (Lees) Director General and<br>(Rayner) Head of Planning<br>and Strategy | Oversaw and led the<br>redevelopment of Imperial<br>War Museum London |

## **Phase 2**

Following the initial analysis of the interview data from the first phase, I made approaches to other individuals from Independent and local authority museums. It was also an opportunity to bring in some other voices who have experience from different (non-capital) project environments and various types of museums, including an additional person who was involved in the Ashmolean Redevelopment at a higher project manager level from an external company. This enabled me to be able to explore and test out whether the theories and observations I had made correlated with the different types of museums. Once I had collated the second phase of interviews, the notes were thematically coded and then analysed.

**Figure 9: Semi-structured Interviews – Phase 2**

| <b>Interviewee &amp; Museum</b>                                 | <b>Position</b>   | <b>Reason for inclusion</b>   |
|---|---|---|
| <b>Andy Bramwell</b><br>Ashmolean Museum                        | Project Manager, MACE,<br>during the Redevelopment                            | Project managed between<br>the Designers & Architects                           |
| <b>Tom Foakes</b><br>Museum of the Order of<br>St John          | Curator during project and<br>Director following its<br>completion            | Independent Museum<br>project   |
| <b>Peter McQuitty</b><br>Museum of Oxford                       | Head of Policy, Culture and<br>Communications at Oxford<br>City Council       | Leading on forthcoming<br>redevelopment of the<br>Museum of Oxford              |
| <b>Steven Parissien</b><br>Compton Verney Gallery<br>and Museum | Director  | Leads an Independent<br>Museum  |
| <b>Lucy Shaw</b><br>Oxford University<br>Museums Partnership    | Head of Oxford University<br>Museums Partnership                              | Experience of working on<br>projects in and across a<br>variety of museum types |
| <b>Paul Collins</b><br>British Museum (now<br>Ashmolean Museum) | Previously Project Curator<br>on the Zayed National<br>Museum, British Museum | Experience working on a<br>project in a National<br>Museum                      |

### **Interview methodologies**

The interviews were semi-structured so that the interviewee could respond in the areas I was investigating, but also add their own take on the subject. It also enabled the opportunity to use follow-up questions to continue the conversation for more in-depth data collection.

The twelve interviews took place at the various museums, or places where the interviewees currently work, in order to accommodate their schedule and availability. All interviews were conducted in person and recorded, so that any variables could be



better controlled. By carrying out all the interviews in person, rather than skype, it was possible to observe not only the verbal responses but also the physical body language and responses on that level. The interviews were an important part of the data collection and research process, as they gave information that was not available in official reports, including personal responses and reflection on my questions and also the follow-up questions. Triangulating this with the other sources means that there will be new findings and wider understanding of this research area of project management in museums.

Once the participants were selected, approached and agreed to participate, the approach I took was to visit the people in their work environments rather than a more controlled interview room. This was for their ease as I had approached very senior and busy individuals. But it was also mainly because I wanted them to be comfortable and speak freely and be in the 'museum mind-set' when I was interviewing them. I sent all of the information to the interviewees in advance and including the range of subjects and questions that I wanted to include in the discussion (Appendix 1-3). I also made it very clear that their participation was voluntary and that they were free to withdraw consent and not take part at any time. This is an important part of access, ethics and informed consent. Therefore, I hoped that they trusted me before I arrived, particularly those that I had not met much or at all before. This data collection process needed to ensure that I gathered accurate and relevant information but also ensured that I developed a relationship with the participants in some way so that I could ask them in-depth questions without making them uncomfortable.

Once the ethics approval had been granted by the University, the preparation for the interviews involved sending out all the information sheets to the interviewees beforehand, along with the consent form. All participants of my project were comfortable with the process and the documentation given to them. Social science qualitative research projects are designed to collect data 'in-situ' in a natural setting, which is important for interviews. It is also important to take into account an awareness of influencing factors in the interpretation of data (cultural, political, social etc.) and on researchers who are the key instrument in the data gathering (Creswell

2012: 46). When carrying out interviews, the need to try and create a controlled environment is a difficult concept in a social situation. Laboratory experiments can be carried out in controlled environments. Interviewing individuals has many variables and considerations to take into account when preparing and carrying them out. This can make it more difficult to avoid creating biases when carrying out the interviews. In order to carry out interviews as part of my research project, the first things I considered were whom I would interview, what kind of information I wanted to obtain, and the type of interview that would help me to do that. When designing the approach to collate data that will go into a case study, it is important to consider the timeframe and environment in order to establish the most appropriate approach to create an accurate, valid and useful case study that can test, develop or answer the theories tested through it (Denscombe 2010: 112).

Throughout the interviews, I recorded (with interviewees' permission) the interview and also wrote memos as a process for recording my thoughts and ideas, as they develop and change throughout the study. This is a good way to outline the evolution of my ideas throughout the process, as well as my understanding and what the influences were that affected those changes. The anthropological and ethnographical approaches come into play at this stage as well, as I am noting not only what is said, but also the body language, tone, avoidance of some subjects etc.. Researchers often begin with very open notes, which become narrower as the process develops and focusses on one concept. Qualitative data can also be coded which is a process to categorise the data and outline the implications of these categories. Again, like the memos, the coding becomes more focussed and narrow as the process goes on. For my research, I used thematic coding in order to clearly find trends and contribute to narratives from across the interviews. I use semi-structured interviews, and any trends or differences should come through from the answers. An analytical approach that worked well with my research and data analysis was to bring together all of the data in the best way to illustrate my emerging and developing theory. Quite often these can be maps, graphs, illustrations that can be used to summarise and link together the data and theory.

There are different approaches to carrying out interviews. Structured interviews involve the interviewer asking the interviewee a series of specific questions, to which a fixed range of answers is possible, which means that the interviewer just 'ticks a box'. This is the typical form of interview used in social survey research, and can provide quantitative data, much like a questionnaire. It seems like a wasted opportunity if you have a person in front of you that you could ask any question, and instead just tick boxes. If this kind of quantitative data is needed then a questionnaire can be done instead, and further and deeper qualitative material can be gathered from a more appropriate type of interview technique, such as semi-structured interview style. Here, the interviewer has a list of questions or key points and areas that they would like to be covered and then works through them in a methodical manner. It is important that similar questions are asked of each interviewee, although supplementary or follow-up questions can be asked as appropriate. The interviewee can respond as they wish. This style does not create the 'tick box' answers, and allows for consistency and further detail to be gathered in a semi-structured way. This worked best because I intended to cover the same themes with each interview, but also push more to get the more individual responses where possible, relevant and appropriate. With leaders and leadership theories, there are different motivations, processes and approaches that individuals take when leading organisations and projects. Unstructured interviews feel more like a conversation rather than the other types and the notes that are used by the interviewer are more like an 'aide memoir' rather than a list of questions. With this style, the interviewee responds to the interviewer in a freer manner and follow-up questions mean that further information can be gathered. Although I would be following up with other questions during the interview, it would have been too free to not have any set questions or areas for discussion. This would then make it difficult to assess it all afterwards collectively as a data set, so the semi-structured approach is necessary. Also from an ethical point of view, the interviewees need to know what questions and areas will be addressed in the session. This is so that they agree to the interview in the full knowledge of what they are contributing to and what they will be asked to speak about.

Questioning technique when interviewing should be planned ahead of time and practiced because an interview is an opportunity to gather information from a particular perspective and penetrate into areas that would not be covered in written reports and similar retrospective written documents. The interview approach and question technique is significant as it can guide the interviewer into getting the most valuable and accurate information from the interviewee, as well as exploring the interview in ways such as what is and is not said. Kvale identified nine types of questions asked in qualitative interviews which create a broad palette of question techniques (Kvale & Brinkmann 2009: 136). Opening up an interview with a key question is often not ideal and it is recommended to use introductory questions which make the interviewee relax and not put the interviewee on the back foot and consequently feel defensive. Broad introductory questions such as 'Why did you...?' or 'Can you tell me about...?' introduce the topic and give some sense of security and platform for the interviewee, as well as background information for the interviewer. For my interviews, I began each time with 'tell me how you came to work in museums/cultural organisations up until project 'X' which we are talking about here today.' This not only served the purposes of making the interviewee feel better and more comfortable, but I then also got their own perspective on their career to date, which filled in a lot of gaps for each person where I had gathered information online for them instead. This worked particularly well with the interviewees that I did not know as well or had only met a few times, like Mark Jones (V&A) or Martin Roth (V&A).

Careful follow-on questioning was helpful for interviews, including when interviewing Christopher Brown (Director of Ashmolean until 2014), where I followed up with a question about the organisational structure of the museum before, during and following the redevelopment of the museum – had the cross-disciplinary design and set up of the 35 new galleries in the Ashmolean translated into the organisational structure of the 5 curatorial departments?

“That’s a very good question...a very good question and it’s a question that, if I may say, is from an insider.” (Brown 2016 Interview)

He then took a gap to think for 8 seconds, which was the longest gap he took throughout the 1.5 hour interview. He then spoke about several related issues including the history and operation during the project, the individuals involved and what thought processes he had gone through instead, but he then concluded that he was not:

“...by any means convinced. Had I been clear on that, then I would have done it and taken the consequences.” (Brown 2016 Interview)

What was interesting was that my ‘insider’ knowledge had helped guide the interview into this area, which does not feature in museum literature – the shape of the organisation. However, what was also interesting was the journey in that ten minutes that Brown went through. It was almost like he was assessing whether the action was right for the time and also if he agreed with himself still now. A good follow-up question can enable this reflective type of response, as well as clarify points that have been brought up in the interview. Being able to hear the person’s train of thought as they get to their conclusion is something that you would only get from an interview. Usually, only the well thought out and considered conclusion would be written down. Therefore, even though there are issues of bias and influence to keep in mind when using them, interviews are a good complementary methodology to use in addition to written sources, because they give you access to information that is otherwise unavailable, as well as potentially bringing about personal and reflective responses.

The order in which the questions are asked can affect the development of the interview. Asking the direct questions at the end, for example, so as to not ruin the flow of the interview is seen as a better approach (Silverman 2016: 69). Also asking questions at the beginning that allow the interviewee ease into the conversation and flow of the interview is important rather than going straight in with the difficult questions where their response needs to be active and comfortable. This ensures that the most accurate and largest amount of data can be gathered from this process.

Pauses and silences in the conversation are not always a bad thing and can be used as a technique as is often done by therapists. Silence can be used as a way for the

interviewee to continue their thought in their heads. Continually firing questions at them can seem intrusive and overbearing and could again make the interviewee clam up and be defensive.

### **Limitations**

There are limitations with all research methodologies and it is important to consider what is appropriate for the subject matter and to bring about the most accurate approach and results. When gathering the data through case studies and related interviews, factors such as the place of interviews will vary for each interview, which means that the environment is not completely controlled. However, this is considered appropriate for the process because the participants need to be made to feel comfortable and able to speak freely. My personal connection to many of them should also be highlighted and considered when analysing the data and responses. Written documents varied between each project. For some of the projects, I have complete access to all necessary documents, whereas for others, I was more reliant on publicly distributed documents and reports, creating a variance in the material I used for each institution. The case study approach accommodates different types and sources of data, which deal with the variety of sources here, and explore the variety of contexts in which the museums and the projects operated. The range of museums that I have used in my case studies have been chosen because of their type and projects. For future research projects, it would be possible to expand this research approach to more museums across the UK. However, for this thesis, I have limited it to the museums that I knew I have good access to and content for.

For the interviews, I used a semi-structured interview technique, and follow-up questions, but as I carried out each interview, I had to be careful to make sure that I did not change my interview technique as I will be learning from each one as I go along. However, I think it is important to check the baseline and aims of the interview process regularly and make conscious decisions to change my technique, depending on the research needs. Through this grounded research approach, the iterative process enabled me to get the most out of the data gathering stage.

## **Conclusion**

For my research, I have focussed on organisation theories and project management theories (Lock 2001, Mingus 2001, Kousholt 2007, Leigh 2012, Pettinger 2012, Hatch & Cunliffe 2013, Leach 2014, Richardson 2015), which led to identification of the gap in the theoretical framework of project management for open project management (OPM). I am examining their usefulness through the lens of the museum. This has created a strong and thorough research plan for this project. I have looked at the potential research philosophies, approaches, strategies and looked at creating a mixed methods plan. This creates a theoretical framework which can ensure that the data collected is as accurate and relevant as possible. Denscombe outlines clearly the overall research process in order to address all aspects related to design and accuracy for the project and the data gathered as part of it (Denscombe 2010). Looking at the subjects and topics covered in my research, it is important to identify and explore the questions, aims and objectives so that the data gathering is directed effectively. This feeds directly into identifying and ensuring the relevance of the research into the existing research body. To be relevant, the research should add value and new material to the research environment, as well as reflect, respond and if necessary, challenge existing ideas and theories. Many museums now have a need to diversify their funding sources, due to a reduction in funding from regular streams. This is often linked to increasing audiences, which puts a greater emphasis and need for marketing and the museum to be a 'communicator' (Messias-Carbonell 2012: 518). With the funding landscape continually changing for museums, and the progress and development of capital projects in museums and the use of project managers, and project and cultural management companies, the opportunity to research in these areas has been opened up.

The feasibility of the research is also possible due to my work and education background in the university and museum sectors, and the willingness of senior managers to take the opportunity to reflect and respond on their experiences and to my research questions. The ethical approval process through the University for this research project was a helpful exercise to consolidate and clearly state and outline these areas, as well as truly think about and recognise the rights of those involved in

the project and how I would use the data in my research. Being objective in my approach was a big consideration for me, as one of the museums I am researching was also my workplace for seven years and I was a project manager involved in the project too. Again, identifying and dealing appropriately with the issue of the accuracy, relevance and objectivity of the research is important throughout the data gathering stage. All of this leads into the design and methodology of the project which should be the most appropriate and fit for purpose approach.

For this project, the data collection included interviews with the leaders and managers who made many of the decisions at the institutions and for the projects directly.

Making decisions as part of the project means that I have direct access to the individuals who led the change and it was important to know what was done and why. Making decisions can often impact on time and cost, as well as the quality of the final products (Field & Keller 1998: 52). By using various sources of data and methodologies, it is very illuminating to look at the capital projects and learn why decisions were made and at what stages, as well as explore whether they would work in that way again, on future projects in similar organisations. When Cameron writes on museums and learning moral lessons, she uses the term 'reforming agendas'. This is similar to 'change' and is linked more with the strategic planning of the change itself and more of a multilateral planned list of changes for the better, in this case with particular reference to the audiences and the museum's role. Cameron writes in the conclusion that 80% of her surveyed audience believes that museums have the opportunity to 'challenge people's way of thinking and change an individual's point of view' (Knell, MacLeod & Watson 2007: 339). It is interesting to see though that this is described as being done through a range of material being presented and allowing the audience to assess and make their own opinions from it. My key research-related questions included understanding about the institution itself and what it was like before their capital project came about, and how they successfully reached and communicated the impact they had as part of these projects, which were essential to understanding the role of the project within the museum, and ultimately how the project processes and team were affected. Why and how the museum approached and delivered their project and the outcomes from it – were they all positive? Were



there unexpected outcomes too? My work also looks at the individuals interviewed and their career and educational history, and how they came to bring about such major change through capital redevelopment projects. An individual's motivation to undergo and lead great change is interesting and can often illuminate certain decision making processes.

The reason I chose these institutions is because I have access to the materials relating to capital projects (both through my own work and also because I have worked and connected with the people working at the other institutions). My role when involved in the project needed to be approached and studied differently than the experience of other project managers, for example. It is important to understand my role here as a researcher and also, when studying the material, how this might impact upon my impartiality. Looking at anthropological theories, more specifically autoethnography, there are theories that can be applied to this experience and influence and inform my approach to studying them. It is true to say that projects where I was involved are difficult to view in the same way as those where I am not. My involvement affects the way in which I see the project, but this is not necessarily a detrimental aspect to the overall research. Self-reflection and being a reflective researcher in this area can bring about insights that would otherwise not be available, referring back to anthropology and the ethnographic approaches that are used to become 'part of the group' in order to fully understand them. I do not have to try and do this and retrospectively make myself part of the group. To a certain extent, I already was and my knowledge from that can be assessed and used to create a wider understanding of the research I am doing.

Traditional ethnographers were often seen as documentarians who would observe and participate in what were often considered 'foreign' cultures and communities (Adams, Jones & Ellis 2015: 11). The ethics of ethnography and the consideration of fair and accurate representation is important and more widely incorporated now. My study through interviews has involved ensuring that the people I am working with understand what I am doing and why, and more importantly, their rights to fair collaboration and representation. Denzin breaks this down into three areas for

consideration when working in an autoethnographic approach exploring self, biography, history and experience: concerns related to performance, process, and analysis (Denzin 2014: 30). This way of looking at my involvement in projects is very helpful and a constructive way to understand and represent my role as a project manager.

## **Chapter 3**

### **Learning from museum projects: research findings**

#### **Introduction**

This chapter sets out the results of the data analysis, initially assessing the overall descriptive themes to establish the patterns that come from the data. This will be followed by an analysis of the individual interviewees, and then look at patterns grouped from the different museum types. This chapter will also include a critical discussion of the findings and their linkages to the existing literature and research in order to ascertain whether this new data supports or contradicts the existing information.

As discussed in the methodology chapter, the approach I have used follows best practice from social science research including autoethnography, anthropology, and organisation related studies. Following on and building on that, this chapter will investigate the literature and theories from organisational studies and explore the aspects of profit and non-profit organisations, and the theoretical basis and underlining of them.

A fundamental part of this research is the interviews with the senior museum staff and their personal responses to the capital projects they were part of. Combined with the written internal documents I have access to, as well as the published documentation, my research questions can be interrogated deeply. Based on research overall, it is clear that there is an opportunity to develop a more specific Flexible OpenProject Management (OPM) approach to developing and managing capital projects in museums, so that the specific organisation type, shape and culture of the museum can be considered from a theoretical and practical perspective, and most importantly, it must be kept in mind that people make projects happen.

From the interviews, the main points that can be drawn out of this research are that the type of museum affects how it acts as an organisation and also how it approaches projects and project management. This is influenced by funding stream (project and longer term streams), the history of the museum structure, and its organisational

culture. It is also clear that museums have their own bespoke needs beyond what is currently covered in organisational and project management theory and practice. The role of the museum, its mission and goals affect the types of projects they take on and ultimately how successful they are judged to be by their multiple stakeholders. In addition to this, capital projects change the physical aspects of a museum, but can also affect the organisation culture, and possibly the structure. Sometimes the impact on the structure is planned and sometimes it is not. An interesting and significant finding is that the intentions for most projects are to consider the changes for the audiences, but the staff needs and organisation shape is not considered after the project finishes. It was also interesting that in the interviews, none of the museum senior staff made reference to 'going back to normal' whereas it is my experience working in projects that this is the case for some staff in the museum who are part of the museum organisation before the project. Organisational theories take into consideration the importance of people and human behaviour, but project management practice is method based, rather than people focussed. Fundamentally, an important point is that, currently, project management does not take into account the specifics of a museum environment, which includes non-profit, audience and non-commercial primary focus, and educational. What is clear from the research findings is that project management theory is lacking in current literature and that approaches and project management methodologies do not take museums and their environments into account. There is a gap in the theoretical framework for museum project management and it should be developed in consideration with museum organisation theory and management. This is where the consideration of the Open Project Management (OPM) approach would benefit museums planning on undergoing capital projects in the future.

This chapter sets out the results of the data analysis, initially assessing the overall descriptive themes to establish the patterns that come from the data. This will be followed by an analysis of the individual interviewees and then the responses from the different museum types. This chapter will also include a critical discussion of the findings and their linkages to the existing literature and research in order to ascertain whether this new data supports or contradicts the existing information. The existence

of theory of organisations is large compared to that of project management, and more specifically to projects in museums. The findings presented in this chapter illustrate the understanding of theory and practice in museum projects, and the potential for further development in the field to better serve the gaps in the theory and practice of projects in museums.

This chapter will examine the results from the interviews in relation to my research questions and, more broadly, in relation to existing research. The purpose of this study is to better understand project management in museums by exploring how museums have gone through capital projects and their approach to project management.

The study involved conducting interviews with museum senior staff from a variety of museums (national, university, local authority and independent), and asking them the same set of themes and questions. The aim is to investigate if project management is the same in all museum projects, or whether the type of museum determines the type of project management or if it needs to be adapted for museums or, more specifically, for different types of museums. Following the completion of the interviews, the data was thematically coded and the data analysed for patterns, contrasts etc. This analysis was included in the narrative and discussion.

The fundamental goals that drove the collection of the data and the subsequent data analysis were to develop a greater knowledge of the use and role of projects and project management in museums, and whether the approaches used are suitable for museums, and to determine if there are more effective and appropriate theoretical methodologies for carrying out projects in museums. These objectives were accomplished through analysis of museum project case studies and sets of semi-structured interviews with senior museum staff, as well as analysis of existing documentation including surveys, internal documents and reports from museum projects. As shown in the methodology chapter, the research approach is designed to include interviews and case studies, as well as an autoethnographic methodology narrative. With the autoethnographic approach, the findings have been reported in a description narrative, with the aim of portraying the full context of the experiences

and the culture of research participants, including me.

### **Interviews: overall patterns and observations**

The main findings and trends that came from this analysis included the fact that project management did not feature as highly as I had expected, but the organisation structure and culture of the organisation did instead, followed by staff. This suggests that museums see projects more through the structure of the organisation and the influence and role of staff, rather than as a process and discipline in itself. Recognition of project management in museums is necessary in order for it to be studied and practised. This again highlights that there is a gap and opportunity to build on existing management and organisational theory and methodologies and develop a more museum focussed project management approach and understanding, which includes all the multiple aspects of a museum's identity. As Weil stated, museums are being pressed to prove the benefits they bring and their relevance to their communities (Weil 2002: 96), but what is missing is the organisational change and understanding of the theoretical and practical underpinning of the process of change (project management) in museums.

Other interpretations that come from the interview data analysis illustrate the importance of the role of funders and funding on museum projects, and the broader external environment that influences museums, thus showing that museums are in open systems and react within them. This study demonstrates clearly that there are differences in approaches and reception of projects in museums depending on the 'type' of museum (e.g. University like the Ashmolean or National like the V&A). This can be seen throughout the interviews and the responses from the staff that worked in the different types of museums.

The thematic coding for the interviews was outlined and tested several times until the final outline was developed. The first version of the thematic coding outline was larger, but it was clear that there were repetitions across the themes, and so it was more constructive for the research to merge some of the categories. There was still a

spread of options so that the coding was broad enough to give sufficient coverage of interpretation and understanding of the field, and also narrow enough so that findings could be drawn from the coding process. The themes map onto my research questions and the main areas of investigation, which means that the analysis links with the existing literature and document review.

**Figure 10: Thematic Coding outline for analysis of interviews**

|          |                            |          |                                       |
|----------|----------------------------|----------|---------------------------------------|
| <b>1</b> | <b>Project</b>             | <b>a</b> | Method and process                    |
|          |                            | <b>b</b> | Cost                                  |
|          |                            | <b>c</b> | Quality                               |
|          |                            | <b>d</b> | Timeframe                             |
|          |                            | <b>e</b> | Issues: went wrong/needed improvement |
|          |                            | <b>f</b> | Team relationship                     |
| <b>2</b> | <b>Museum Organisation</b> | <b>a</b> | Type/Culture                          |
|          |                            | <b>b</b> | Size/Structure                        |
|          |                            | <b>c</b> | Change/Physical                       |
| <b>3</b> | <b>Collections</b>         | <b>a</b> | Display                               |
|          |                            | <b>b</b> | Interpretation                        |
|          |                            | <b>c</b> | Storage                               |
|          |                            | <b>d</b> | Improved conditions                   |
| <b>4</b> | <b>Audience</b>            | <b>a</b> | Visitors (Number/type)                |
|          |                            | <b>b</b> | Stakeholders                          |
| <b>5</b> | <b>Funding</b>             | <b>a</b> | Funders (Government)                  |
|          |                            | <b>b</b> | Funders (Trusts and Foundations)      |
|          |                            | <b>c</b> | Funders (Private donors)              |
|          |                            | <b>d</b> | Sustainability                        |
| <b>6</b> | <b>Profile and Legacy</b>  | <b>a</b> | Stakeholder/Peer approval             |
|          |                            | <b>b</b> | Raising profile                       |
| <b>7</b> | <b>Leadership</b>          | <b>a</b> | Who                                   |
|          |                            | <b>b</b> | Why                                   |
|          |                            | <b>c</b> | How                                   |
| <b>8</b> | <b>Staff</b>               | <b>a</b> | Pre-project                           |
|          |                            | <b>b</b> | During                                |
|          |                            | <b>c</b> | After                                 |
|          |                            | <b>d</b> | Temporary                             |
|          |                            | <b>e</b> | Freelance                             |
|          |                            | <b>f</b> | Designers                             |
|          |                            | <b>g</b> | Architects                            |
|          |                            | <b>h</b> | Morale                                |

**Figure 11: Thematic Coding: Breakdown of top 3 themes for each interviewee**

| <b>Name</b>   | <b>1<sup>st</sup> Top Theme</b> | <b>2<sup>nd</sup> Top Theme</b> | <b>3<sup>rd</sup> Top Theme</b> |
|---|---------------------------------|---------------------------------|---------------------------------|
| <b>Christopher Brown</b><br>(Ashmolean/University)          | Staff                           | Museum<br>Organisation          | Audience                        |
| <b>Robert Thorpe</b><br>(Ashmolean/University)              | Project                         | Museum<br>Organisation          | Staff                           |
| <b>Nick Mayhew</b><br>(Ashmolean/University)                | Staff                           | Museum<br>Organisation          | Funding                         |
| <b>Andy Bramwell</b><br>(Ashmolean/University)              | Project                         | Museum<br>Organisation          | Leadership                      |
| <b>Lucy Shaw</b><br>(OUMP/University)                       | Project                         | Museum<br>Organisation          | Audience                        |
| <b>Mark Jones</b><br>(V&A/National)                         | Collections                     | Project                         | Museum<br>Organisation          |
| <b>Mark Damazer</b><br>(V&A/National)                       | Project                         | Audience                        | Staff                           |
| <b>Paul Collins</b><br>(British Museum/National)            | Project                         | Museum<br>Organisation          | Staff                           |
| <b>Diane Lees and Vanessa Rayner</b><br>(IWM/National)      | Museum<br>Organisation          | Project                         | Staff                           |
| <b>Tom Foakes</b><br>(MOSJ/Independent)                     | Museum<br>Organisation          | Project                         | Staff                           |
| <b>Steven Parissien</b><br>(Compton Verney/Independent)     | Funding                         | Audience                        | Museum<br>organisation          |
| <b>Peter McQuitty</b><br>(Museum of Oxford/Local Authority) | Audience                        | Project                         | Collections                     |



## Results Discussion

### 1. Theme: Project (Appendix 4, Figure 14)

Having Project as a theme is obvious due to the nature of my research, but as I have already stated, what was interesting was that there was more emphasis on the museum as an organisation and entity, rather than too much focus on the rest of the project. What this shows is that at a senior level, the staff see the project process as a methodology to transform the museum or part of it, and that afterwards there is a new entity. The common theme that came out from the interviews was that the senior staff would talk about the new organisation and look forward to the new ways. My experience is that some staff and areas in a museum quite often refer to 'going back to normal' or are keen to move onto business as usual with their daily work, rather than the new and often added pressures of a project. This shows the distinction between levels and areas of a project within a museum, how the project is received and reflected upon, and also that the shape of the organisation affects how much the project works throughout, creating change. Jones (V&A) referred to the way in which he wanted to create an environment that had continuous projects, so that it was part of working at the V&A, rather than something separate.

"What we wanted to do at the V&A...[is have a] programme which was coherent and continuous...We turned a culture from 'we do not have time and we cannot do this' to one....where people would say 'this will take time and lots of effort but can be done.'" (Jones 2016 Interview)

Another important finding this shows is that there is some lack of clarity in communication about the project's purpose at a policy level and its long term goal as well as a lack of understanding of the impact of the project after it has been completed on the people in the organisation itself.

The Project theme was broken down into sections that reflected areas within it, and also followed the main areas covered in project management terminology. This included method and process, the cost-time-quality dynamic that most project methodologies are based on (Carpenter 2010: 79), issues (what went wrong), and the project team relationship. Across these themes, the cost-time-quality and project

team relationship categories were referenced around the same amount across the interviewees, but were low in comparison to the method and process and issues section. The slightly higher response in timeframe was Lees & Rayner (IWM) as their project had a very fixed deadline (2014 First World War Centenary) for completion, meaning that this was a higher issue for them. Lees & Rayner and Bramwell (Ashmolean) referenced method and process the most, which is because their career backgrounds are heavily involved in creating and managing projects, compared to the others in the interview group. Bramwell and Thorpe (Ashmolean) also referenced the Issues category, which again also reflects the nature of their roles. Bramwell was managing the relationship between the Ashmolean Museum/University of Oxford, and Thorpe was brought in from a commercial banking background to oversee operations and financial management of the Museum and project. All of this would relate directly to being risk focussed on the project. Brown and Mayhew (Ashmolean) and Parissien (Compton Verney) did not have the Project theme in their top 3 categories at all, and were more focussed on other areas that related to projects. With Brown and Mayhew, it shows the delegation of the project management within the organisation.

Not all museums use team members who are explicitly titled project manager. For example, Parissien (Compton Verney) explained in the interview that it was only for HLF funded projects that they had a project manager, and that as an independent museum they needed to focus on bringing in revenue. Otherwise, the projects, like new galleries, were led by their curators.

“We used internal staff....the first time we used a project manager was for an HLF project, because they paid for it.” (Parissien 2016 Interview)

Although the curators were not explicitly called project managers, they were still managing projects, which means that project management skills and methodologies were still important.

Overall, the focus on method and process, rather than cost-time-quality in the reflective process during the interviews is not surprising. The management of the cost-time-quality areas are for the most part the role of the project manager during the project. The senior managers are more interested in the overall method and process

and how to tackle the issues that came up, as these areas will affect their work and the wider museum directly.

## **2. Theme: Museum Organisation (Appendix 4, Figure 15)**

As it was clear from my literature review that organisations and related theory was important to understanding museums and projects, so it was important to include this as a theme in the interview analysis section. It was also a common way in which the interviewees referred to projects. Rather than talk about the project, they would refer to how it affected the museum organisation, in both positive and negative terms.

“There was [at that time] a lack of coordination in [project management] process...steep learning curve towards a common organisation goal”  
(Paul Collins 2016 Interview)

“[During the project] there had not been any consideration of the internal structure of the institution” (Tom Foakes 2016 Interview)

The themes within the Museum Organisation section looked at the structure, culture, and change as categories. Again, this was based on the themes in the literature review and the areas I wanted to investigate further in fieldwork. All but two of the interviewees had this theme in their top three. Damazer (V&A) and McQuitty (Museum of Oxford) did not, but this can be explained because of the organizational structure of the Museum of Oxford as a local authority museum, and the early stage of their capital project. Damazer is a Trustee of the V&A and specifically stated in the interview that his role was to support the senior management to do their job and to offer ‘scrutiny at a top level’ so would perhaps not think about the museum organisation in the same way as the senior staff.

“Not to run the museum, but allow the management to run the museum.”  
(Damazer 2016 Interview)

The Museum Organisation theme was the highest referenced category for Lees & Rayner (IWM), and Foakes (MOSJ), and it was consistently the second highest for all

the interviewees from the Ashmolean. This also shows that, comparatively to the Museum of Oxford, for example, the University museum in this case has more autonomy over its organisation, as well as the benefits of being part of a larger organisation like the University of Oxford.

All three categories (culture, structure, and change) were consistently referenced by the interviewees, but there are some very high categories from Lees & Rayner in size and structure, and Foakes in change. Lees & Rayner were focussed on the capital project and how this would enable them to make the organisation both fit for purpose in terms of for their audiences and also to fit the new financial situation from the funding cuts from DCMS. This was reflected in the interview and also written into their corporate plan (IWM 3).

“[Making] changes to the physical structure, organisational culture, staffing model, making it a more flexible and creative structure”

(Lees 2016 Interview)

Foakes had both been part of the project at the MOSJ and also gone through the organisational restructuring of the museum afterwards, so it would make sense that this is such a high response on this particular category.



**Figure 12: Museum of the Order of St John – physical redevelopment (Metaphor/Hutton & Crow).**

The theme of Museum Organisation is an important one for the interviewees overall and is taken into careful consideration in projects and will be discussed in the context of culture and behaviour in the next chapter.

### **3. Theme: Collections (Appendix 4, Figure 16)**

Collections are a high priority for museums in most situations, and it is interesting that in this interview set the references in this theme are low comparatively to the other themes – Staff and Museum Organisation were referenced far more, for example. From my experience of working on museum capital projects, usually one of the main needs that museums stipulate to funding bodies is that the display of the collections is not fit for purpose for the conservation of the objects and also communicating to audiences' perspectives. Many of the interviewees did not mention the collections at all, even though the projects they were talking about included large redisplays as part of their aim. This shows again the importance of the museum organisation, rather than the collections. It could also be the strength of the museums in their role as conservators and guardians of the collections, that there is more of a focus on the human element that relates to new displays. This can be understood through Weil as he described the evolution of the role of the museum from being 'about something to for somebody' (Weil 2002: 28) and that a museum's purpose was more 'social' than purely 'museological' (Weil 2002: 10). This can also be seen by the emphasis on methods of communication as shown in the categories of display and interpretation, which are the most consistently referenced overall by the interviewees. The role of the museum as an organisation will be explored further in the next chapter.

McQuitty (Museum of Oxford) had the Collections theme in his top three, which is interesting because the museum actually does not own the collections it uses. All the objects are on long term loan from other institutions, including the Ashmolean and Oxfordshire County Council. But his reference to the Collections was not just from a collections care perspective, it was about using them as a catalyst for community engagement and collaborative displays in the new galleries, which is essential to the new role of the museum after the project and its audiences.

“The only way a social history museum can move forward and live (is through co-curation). It’s important for the local people in Oxford and also important for the tourists.” (McQuitty 2016 Interview)

There is one large response from Jones (V&A) for protection of objects, which is an anomaly because Jones spoke at length about the way in which new galleries did not need to have expensive equipment included in order to maintain and protect objects on display, which was a little off topic, and I brought the interview back to my area of questions during the interview process.

Collections, although often at the heart of the museum, was not the highest focus when the senior staff were talking about museums capital projects. This, again, is another interesting point and perhaps one that reflects some lack of understanding of many staff values by leaders of the museums. It matches the recognition of the change in role of the museum from being a collections focussed entity to one that is more public engaged and answerable to them (Weil 2002: 31).

#### **4. Theme: Audience (Appendix 4, Figure 17)**

Like Collections, Audience is an important consideration for museum projects and is often cited as a reason for carrying out the project, such as increasing physical accessibility and interpreting the collections in the displays for existing audiences and to encourage new ones. The two categories in the theme are visitors and stakeholders, which covers all the audiences in and outside of the museum. All audiences, as described here, are important to projects in terms of being the users of the end product. Brown (Ashmolean) referenced both categories in the theme of Audience a lot and the most out of the group of interviewees. The reasoning he gave for the project to redevelop the Ashmolean was both the visitors and he also regularly referenced the stakeholders (funders, University etc.) when describing it. In the interview, he mentioned a particular time when he was in the museum and a couple, one of whom was in a wheelchair, could not see particular galleries or the collections in them, due to the inaccessible route. Mayhew (Ashmolean) referred to this in his interview too.

“The museum needed to dramatically improve its public offer...I knew it was the right thing for the Ashmolean.” (Mayhew 2016 Interview)

The aim was to make the whole museum physically accessible to all and also interpreted in a way that would fit the remit of a University museum and audience but also much broader to include new and larger audiences. The importance of wider stakeholders is interesting too. Damazer (V&A) focussed on the Audience theme but stakeholders only, rather than visitors to the museum. That reflects his role as a Trustee and looking at a higher level, but also his preference for and awareness of stakeholder importance. Again, looking at the evolving role of museums, it is also interesting that Damazer’s background is in media (BBC Radio – worked with Neil MacGregor on the World in 100 Objects) and that museums are becoming more public engaged in their research, programming and display, rather than purely collections led. Although it may be perceived this way (Weil 2002: 34), it may actually be that museums are a human construction and have the intention of informing and amazing audiences with their collections. Now, audiences are being more responsive and museums are hearing more feedback and understanding what it is that audiences are interested in learning and seeing.

At the Ashmolean, the results show that Brown, Thorpe and Bramwell were very focussed on this area. Parissien (Compton Verney) was also high in this category, which is not surprising as he came into the organisation as Director and had to focus on the financial side (visitor income) and ensure that the organisation could continue and survive. He also emphasised the importance of collaboration:

“which is necessary in order to go forward and ensuring the sustainability of the organisation...by making savings across the board...through diversification of the financial activities.” (Parissien 2016 Interview)

What is also interesting is that some of the people did not mention either of the categories at all. Four of the interviewees did not mention visitors (Mayhew, Damazer, Collins and Damazer) and Lees and Rayner did not mention the other stakeholders. This may be because my research focusses on project management which is a process,

so perhaps not all interviewees made the link themselves, but also it may reflect the nature of their role and the priorities from their perspective.

### **5. Theme: Funding (Appendix 4, Figure 18)**

The categories in the Funding theme cover the types of funders (government, trusts and foundations, private donors) and also the issue of funding sustainability. This was a popular theme chosen by the interviewees, and it is clear that funding and the role of funders affect all museum types. Overall, there was more of a focus on the trusts and foundations and the private donors, rather than government funding. This was because National museums will focus on government funding, whereas the other museums have referenced how they have diversified their funding streams and income.

For the University museum (Ashmolean) interviewees, there was more of a focus on the trusts and foundations, whereas the Independent museums (Compton Verney and MOSJ) there was more of a focus on sustainability than the other interviewees, showing how closely the cuts affect the operations and plans.

“Pre HLF [project], the museum was in quite a vulnerable position. St Johns Ambulance has increasingly become more business-like and commercialised, and it would have been difficult to continue the museum as it was. The project saved it.” (Foakes 2016 Interview)

Lees and Rayner (IWM - National) referred to government funding and sustainability only, which shows where their main focus was in funding and their motivation for the project.

“Over that same time, we lost our grant in aid...which was about 35% of our grant in aid...all in the lead up to the centenary, our funding was being cut. It is like a rubix cube way of managing things, with a vision led project.”  
(Lees 2016 Interview)



Brown (Ashmolean – University) was the only interviewee to mention all four categories in Funding theme.

“Fundraising for such a large project was challenging...and the Ashmolean Fundraising team was a successful part of the organisation design.”

(Brown 2016 Interview)

This makes sense with his role and approach to the project, as one of the main areas he worked on was bringing in the £61 million needed for the redevelopment, and that involved accessing all types of funders.

## **6. Theme: Profile and Legacy (Appendix 4, Figure 19)**

The categories within the theme of Profile and Legacy were peer recognition and raising profile. When undergoing a major capital project, this can often be a key reason for the project. Overall, this theme had a low frequency, and across the two categories, eleven of the interviewees did not mention them at all. Mayhew (Ashmolean) had the highest in Peer recognition, because this is his area within the project as he focussed on bringing together curatorial expertise and quality of the displays. One of the main concerns raised at the early stage of the project was ensuring the quality of the research in the galleries was not lowered. The museum was concerned about ‘dumbing down’. Mayhew reflected that:

“the galleries were received well and they were not accused of dumbing down.”

(Mayhew 2016 Interview)

This shows that the Ashmolean succeeded in one of its quality aims for the redevelopment project. Jones (V&A) also had the same emphasis on quality as Mayhew, as he described the need to bring up the standard of the V&A to that of other museums and make it world-class through the programme of projects in FuturePlan (V&A 9).

## **7. Theme: Leadership (Appendix 4, Figure 20)**

Leadership was another theme that was useful for me to investigate, and also relevant when exploring project management process and behaviour in a museum project context.

Brown (Ashmolean), Jones (V&A) and Bramwell (Ashmolean) mentioned it the most and referenced leadership in terms of 'getting the job done', whereas Bramwell had an additional focus on why as well as who. Bramwell has experience in a wide range of environments over his career (National Maritime Museum, Cutty Sark, Barbican, Ashmolean and the forthcoming Holocaust Memorial in London). Bramwell also highlighted Project and Museum Organisation themes, all of which combined reflects on his role and the relationship he had 'in between' all the stakeholders during the Ashmolean Redevelopment, and his need to know where and with whom to communicate to in a museum like the Ashmolean, because it was difficult to know if the client was the Ashmolean or the University Estates Office. Something he highlighted in leadership was with reference to project management methodologies.

"It is not just about Gantt charts and risk registers, swot analysis....and certainly isn't about PRINCE2 methodology. You can have all the process maps in the world....it is all about soft skills and getting people to work together."

(Bramwell 2016 Interview)

Leadership style is important and includes having good traits to listen and respond to others, rather than just a top-down approach. This was echoed by Foakes (MOSJ) who also highlighted that the 'soft skills' were important in project management in museums and that not everyone has them.

"It's not just project management, it is good management...good communication, having systems in place...Having resilience in yourself and the organisation." (Foakes 2016 Interview)

This is similar to what theorists say about leadership in that some have the traits to 'make a successful leader' and others do not (Drucker 2007b: 137). Damazer (V&A)

also highlighted that leadership was very important, but not everything in an organisation.

“Building projects need technical material that needs to be done...local management and leadership. Leadership takes many sizes and shapes. It sure as heck matters – leadership is not independent of the institution...but it is not just centred on them.” (Damazer 2016 Interview)

Brown’s role was to lead and have the vision for the Ashmolean project. The internal staff he included at Deputy Director level were able to oversee areas he considered strategic for the delivery of the project – collections (Nick Mayhew), Operations (Robert Thorpe) and Development (Edith Prak). When speaking of his choice to have Mayhew work with the rest of the museum curatorial staff, he reflected positively on how it worked within the organisation and the project.

“...he [Mayhew] was able to get the best out of the staff, therefore, he was able to get the best out of the Departments.” (Brown 2016 Interview)

Thorpe had a similar viewpoint to Brown in that he would speak of the project from a very high level, but Staff did not feature most highly in his interview, and was third after Project and Museum Organisation. Staff were important, but there were several layers of management between him and the staff working directly with collections, installation etc.

Jones also referenced leadership as an essential part of leading a programme of change in a museum, as well as focussing on the people involved in the organisation and projects.

“Leadership needs to be about being firm and setting direction, but also respecting everyone’s part and respecting them in what they’re autonomy.” (Jones 2016 Interview)

Thorpe also referred to the stakeholders in order to highlight his understanding and perception of his role within the project.

Mayhew (Ashmolean), Parissien (Compton Verney) and McQuitty (Museum of Oxford) did not mention Leadership at all in any category. This may be because they are leaders themselves which is why they did not actively refer to it at all.

#### **8. Theme: Staff (Appendix 4, Figure 21)**

The Staff theme was broken down into eight categories to understand more specifically what area within the theme the interviewee were focusing on. This was a highly chosen theme and all categories had a lot of responses. The level of response from all interviewees shows how important people are for a project. Brown's (Ashmolean) main focus was Staff, but looking more specifically, it was the higher level staff that he was referencing in the interview, whereas Thorpe (Ashmolean) was most concerned with the Project theme first and then Staff. Mayhew (Ashmolean), like Brown, had Staff as the top theme, but he was referring to a wider range of staff, including the lower paid staff whom he described as the people 'on the ground' making it happen. Mayhew was the only member from the Ashmolean to mention my role (Projects Manager) in the redevelopment project, even though, throughout my seven years at the Ashmolean, Brown and Thorpe had also been my line manager.

"Mountmaking was another one of your great triumphs, that was very unglamorous and had not been considered enough properly and accounted for." (Mayhew 2016 Interview)

As Mayhew said in the interview, there were many people 'on the ground' that are not visible after the project is completed and the recognition is more focussed on the architect and designer rather than the short-term and lower paid staff.

"Many short term and modest paid staff were brought in for the project....it helped the project and also gave them much appreciated experience....In retrospect, the internal staff and the additional low level hands brought in for the project, [that] delivered the project." (Mayhew 2016 Interview)

Nick Mayhew (Ashmolean) had this as his primary focus, with his second most focussed one being the Museum Organisation. It was clear from his answers that he

was very aware of the specific roles played by individuals in order to achieve the larger goals and one of his final comments was that the project could have been improved by including fewer higher paid external project managers and more of the internal lower paid staff members. He recognised that the collective role of the more experienced individuals internally made more impact on the quality and deliverability of the project overall. It is difficult to see what is the best way forward when leading such a large project, which has such a large construction element and also the reinterpretation and design of so many galleries. Hiring experienced consultant (external) project managers can be justified because it lessens many risks to the project, however, the cost for this is high and if the issues are getting the work streams completed on time and on budget, then a clear remit is needed for that project manager to ensure that this resource is identified and allocated as soon as possible. Otherwise, a lot of funding for highly paid consultants is used up quickly. Used effectively for specific periods and remits is the best use of the funds and experienced external consultants (Ashmolean 21). They are not able to complete work streams themselves, unlike internal project managers, but they can be instrumental in identifying areas that need attention, and influence and instigate change throughout the project. Mayhew concluded that:

“If your institution is big enough, then you should have your own in-house project managers.” (Mayhew 2016 Interview)

Tom Foakes (MOSJ) had a similar perspective when discussing the staff needed for a project and also as part of the ‘new’ organisation going forward afterwards. He was very interested in the way in which staff were brought together and the working ethos and culture that was brought together during a project and those that can handle the journey that project takes them on.

“Not long after opening, the museum organisation [structure] was not right for the new museum...and was followed by a restructure...which made it much more fit for purpose. The museum needed new skill sets.”

(Foakes 2016 Interview)

This will be looked at in more detail in the Culture and Leadership sections in the next chapter. The coding showed that Foakes was very focussed on the museum

organisation, particularly as his role has continued and evolved since the project was completed. However, much like Mayhew, Lees and Rayner, Foakes was most interested in how this developed and worked with the staff and project combined, thus recognising that there are many components at play when museums go through projects and significant periods of change.

Diane Lees and Vanessa Rayner also referred to staff but in the broader conversation of museum organisation and issues related to staff when restructuring the organisation, or focusing on specific roles and needs for the organisation, such as the 'Change Director' that was recruited when change was being scoped and developed.

"[The Change Director] tested our perception of how the organisation could be...the role could deliver the difficult news and then ultimately leave the organisation, so that those that remain there are able to continue working there together...Needed a morale underpinning, it was important to have this when doing this role." (Lees 2016 Interview)

When looking at the Staff category, the relationship is clear with the Museum Organisation, which includes culture and structure. Paul Collins spoke of his work in a national museum too and brought together the ideas of bringing museum cultures together in an international context with his work on the Zayed National Museum Project at the British Museum. This did not always come together, in his view. With the project managers, they seemed to 'float' around the Museum and were used on different projects. This is similar but less structured than the V&A which has its own project department. The latter creates a framework for the 'institutional memory' and also collective learning, whereas 'floating' members of staff can restrain how much this is possible. The knowledge is then in the individuals and the group learning is limited. Being a 'floating manager' in a smaller organisation can be difficult to ensure that projects get traction when operating in this way. It relates to the theory of the 'matrix' organisation, however, it is more difficult when the entity crossing the departmental lines is significantly smaller than the Departments.

It is also important to have the 'buy-in' of the managers from those Departments so that the team members actively participate in the project work too and meet

deadlines. Having staff there who are resilient and also aware of what else is happening in the museum is important. The success of a project is not only getting it done on time and budget, it is also ensuring that the members of the project team, including those that continue to be part of the organisation afterwards, are able to think positively of the project and their part in it. This is difficult when bringing about change and not everyone involved will always feel good about it, and certainly not all of the time. In the following chapters, the structure and behaviour of organisations and museums will be explored in more detail.



**Figure 13: Ashmolean Museum Cast Gallery – technician team  
(Victoria McGuinness/Ashmolean Museum)**

The category that had the fewest responses was temporary staff. There may be two reasons for this: the interviewees did not recognise the temporary staff as temporary, which is why they were not mentioned in this way, or they did not think that the temporary staff were worth mentioning or played a part in the project. I expect that the latter is not the case, and that it was more likely to be that the interviewees did not identify the staff as temporary. Many contracts in museums are temporary and so it is commonplace to have short-term contracted staff, particularly on projects.

The most referenced category was 'during the project', which makes sense as the interviewees reflected on the body of the project and what happened throughout. The Independent museums referred to the 'after the project' the most, particularly Foakes (MOSJ) because of his role during the project and afterwards in the years since. This also shows the reflection of the interviewees as they look back on the projects.

"Scope of the project...could have included (consideration) of the infrastructure...website...and collections management system...considering all the behind the scenes stuff which means the museum can run better."

(Foakes 2016 Interview)

The Ashmolean category focus reflected their roles; Thorpe mentioned the freelance staff most and Mayhew the designers, which reflected their roles in the museum during the project.

Shaw (OUMP – University) did not refer to the Staff theme at all, which can be explained because she did not line manage staff in the projects she participated in, and she has not worked on capital projects in museums, but has a great wealth of experience in other projects and a cross-University museum experience from her current role as OUMP Manager. Shaw also gave a very interesting insight into her personal journey as a project manager, which developed organically, and she said that her formal training at that point when she began managing projects was limited.

"[When] I started managing projects...I did not have (official) project management training." (Shaw 2016 Interview)

What is clear overall is that 'Staff' is a very important theme and interwoven with the role and success of the project, because projects are when the individuals come together to complete something together. Pooling experience to be able to manage and deliver projects can come from other relevant experience. The group I interviewed were more interested in the higher level staff roles, the vision, leadership and they referred mostly to the project and museum organisation collectively rather than separately. Many of the people I interviewed were also still involved in the same organisations and perhaps their remembering of the events etc. was more reflective



and influenced by the time after the project. Staff, or more specifically people, are essential to any museum capital project and this is why they are so regularly referenced in the interviewees.

### **Key Overall Findings**

1. Open Project Management (OPM): There is a gap in the theoretical framework for museum project management and it should be developed in consideration with museum organisation theory. Organisational theories take into consideration the importance of people and human behaviour, but project management practice is method based, rather than people focussed. Project management does not take into account the specifics of a museum environment, which includes non-profit, audience and non-commercial primary focus, and educational. Project management theory and management methodologies do not take museums culture, structures, or environments into account and should also involve leadership and motivation theories.
2. Further to this, the reason museums undergo projects varies depending of the type of museum – more specifically, the way in which the museum is funded.
3. Museum capital projects have the intention of changing the physical aspects of a museum, but can also affect the organisation culture, and possibly the structure. Sometimes the impact on the structure is planned and sometimes it is not. The intentions for most projects are to consider the changes for the audiences, but the staff need and organisation shape is not considered after the project finishes. None of the Museum Senior staff made reference to ‘going back to normal’ whereas it is my experience that this is the case for some staff in the museum that are part of the museum organisation before the project.
4. Project management process and approach varies depending on the type of museum. This issue is felt more in smaller museums than larger ones, where it seems that National museums deal with project management processes and project environments more easily than University, Independent and Local Authority museums. (Larger structure, silos, more staff).

### **Key Finding 1**

**Open Project Management (OPM): There is a gap in the theoretical framework for open project management (OPM) and it should be developed in consideration with organisation theory.**

Organisational theories take into consideration the importance of people and human behaviour, but project management is method and practice based, rather than people focussed. Project management does not take into account the specifics of a museum environment, which includes non-profit, audience and non-commercial primary focus, and educational. Project management theory is limited, and project management methodologies do not take museums culture, structures, or environments into account and should also involve leadership and motivation theories.

Once the full set of interviews was complete, I was able to code and analyse in different ways the data that came from the collective responses. There were several general observations which I noted that came from looking at them as a group. One of my main assumptions when beginning this research was that project management and the project manager would be mentioned more often in the interviews, particularly as this role plays a key role in the delivery of the project. Having been the project manager in many museum projects, it was both surprising and slightly saddening to see that these roles were not always acknowledged and visible. Even those interviewees that had similar roles in the past as project managers did not highlight it particularly significantly. The absence of the project manager being mentioned may be more reflective of the way in which museum organisations operate and exist. A project is a temporary entity and process to create a final product or change. Once that has happened, much of the project processes may be lost because the focus is on the quality and success of the final product. As museums often create new visitor led entities through capital projects, the evaluation will often focus on the audience response. What this will not capture is the efficiency and quality of the project management overall and potentially loses some of the lessons learned. By creating a flexible-framework, as will be discussed in the next section, there is an opportunity to create a responsive and cyclical entity that can understand and develop including consideration of the needs of the museum.

Organisation theories have developed over the last decades from scientific analysis and approach to improving mechanisms and processes in organisations in order to be more profitable, to the ability to take into account the human influences. Theories of human behaviour and motivation realised that in order to have the best outcome in terms of efficiency and overall organisation performance, the staff and their needs and motivations should be taken into account and addressed (Carpenter 2010: 87).

Drucker (Drucker 2006) included this consideration in his work on volunteer and non-profit organisations. Capital projects are about moving the museum in a different direction and it is why museum projects are different to other projects – why it is different to how project management is taught and theorised in other environments. Museum projects can change how an organisation operates and is received and reaches audiences. Building a new road does not change how people drive, it is the whole environment and development around it. The implication of these findings is that museum capital projects should have their own approach and consideration of the museum organisation and its environment.

### **Flexible-frameworks for project management in museum organisations**

These findings highlight and support the idea that museums should have their specific organisational structure and culture taken into consideration when choosing project management approaches for capital projects. Moving on from scientific, administrative, bureaucratic, systems, complexity, motivation, and leadership theories, this takes into consideration the structure and culture of the organisation. By creating a flexible-framework, it would be a project management approach and theory that is woven into the organisation in a way, depending on the shape of the organisation. This would mean that the time and activity of the project team would be overlaid onto the organisation with the organisational existing structure and culture taken into consideration. Project management in museums takes account of the swift level of change in terms of activity and funds and the nature of the rest of the resources, such as staff, involved. Just as the collections of a museum organisation need particular consideration and treatment, so do the rest of the resources. This does not mean giving endless time for strands of activity to happen, but adding in more

development and design time, so that a reflection and feedback loop can be incorporated into the project management approach. This would mean that it is not just linear, but more cyclical in leading and responding. Like the Hawthorne experiments, investing time and understanding and empathy with the museum staff is very important to the overall success of the project. It is not just the time and cost that museums are judged on, it is the quality.

The implications and practical application of this research can be seen in how museums approach project management in future capital projects, with specific consideration of their organisational structure, culture and, ultimately, the shape of their organisation. Project management in museum capital projects needs to have a flexibility and ability to adapt to different shapes. By this, I mean that it needs to take into account the theoretical underpinning and basis of museum organisations and weave this into the planning and practicalities of open project management (OPM). Capital projects in museums represent periods of significant change – not just physical, but also in terms of how the organisation changes and operates in a new environment. There is a gap in terms of how project management is understood theoretically in non-profit environments, and particularly museum organisations. This is shown in the literature review for this thesis and also in the responses of the interviewees. The references to project managers and project management is very limited, and instead language which relates to the organisation and museum itself is used. Therefore, there is an opportunity to bridge the differences and areas between organisation theories, including leadership and motivation, and project management, in order to create a more effective and broader approach to managing projects in museum organisations. Building on organisation and leadership theories, OPM involves an understanding of projects in non-profit organisations.

## **Key Finding 2**

**The reason museums undergo projects varies depending of the type of museum – more specifically, the way in which the museum is funded.**

### **Purpose**

The purpose of the project was a regular starting point for most of the interviewees – it is the way I opened the interview and also a good icebreaker and broad question to begin with. Some of the Directors would link the ‘why’ with a potential funding opportunity which could enable it to go ahead. The links between ‘why’ the project is carried out can be linked back to funding and more specifically the opportunities for developments and potential increased sustainability of the organisation. Throughout the coding, the combination of 1a (project management method) and 5d (sustainability) was common and this is because they can often both be linked with the motivation aspects of projects and longer-term planning. For some smaller museums, projects may be a last resort in order to survive following significant funding cuts to regular annual funding. For example, in order to bring in larger audiences and have successful commercial services, it is easier when there is a new gallery or building for the audiences to come and see. Capital projects can also cover some staffing costs during their project lifespan, which can cover core staff costs for a certain period, helping the museum cover regular operation costs for a short time.

### **Physical conditions**

When talking about the reasons why the projects were originally thought of and went ahead, many of the interviewees referred to the physical conditions of the ‘old’ institution, and the effect that had on the audiences, access and reach, as well as the collections. This was picked up in coding and was highlighted that Collections were particularly important for Mark Jones (V&A) as the motivation to engage in such a large amount of refurbishment and over such a long period. Apart from Jones, it was only Peter McQuitty (Museum of Oxford) who had Collections in their top three themes, along with Audiences. McQuitty is at the beginning of the project and the motivation to go through a large project is led by the role of this museum to its community, the opportunity that collections give to engage with them, and the need

to create an environment in which they can be safely and appropriately displayed. The audiences for a local authority museum are demographically different from national museums, and also their role and activity. Local engagement and actively working with local and hard to reach audiences is very important to this local authority museum

“Co-curation is the number one thing – calls out through network –are there objects that are important in your neighbourhood.” (McQuitty 2016 Interview)

They were also linked through the Oxford University Museums Partnership (OUMP) as a delivery partner. They work on reminiscence groups and outreach and also use collections from other museums including the Ashmolean and Oxfordshire County Museums. Their brand is very different to the Oxford University Museums, who focus on a multitude of local audiences, but also highlight the ‘world class’ aspects of the collections. The Museum of Oxford has a very Oxford city and local focus as is shown through the theme of their forthcoming potential refurbishment ‘Hidden Histories’. The need for the museum to diversify its role and ability to bring in funds is very clear in the financial environment it is operating in.

“Whilst the outcome for national museums and Arts Council England is a very positive one, National Museums Directors Council (NMDC) remains deeply concerned for regional museum funding with the announcement of further cuts to local government grants from DCLG. Although many councils are well aware of the vital benefits that museums provide to their local communities and economy, further cuts to local authority budgets will put critical pressure on funding for museums around the country. We hope that councils will follow the government's lead and continue to invest in museums despite the challenging economic climate in which they are operating” (NMDC 1).

Many museums need to address the conditions of their buildings both for the people visiting them and the care of the collections, and capital projects are brilliant opportunities to do this. But how the museum operates in that building afterwards and the shape of the new museum organisation and response to its environment is also very important.

## **Funding**

What is clear is that there are a variety of funding streams and models for operational costs, but with capital projects, all museum types are accessing the same sources. The regular pattern, as already said above, is to develop a capital project plan covering both the physical and design and display aspects of the museum. Then, a large donor is then sought, which is usually Heritage Lottery Fund (HLF), which then gives confidence to other potential funders to support the project. As a café, shop, and spaces suitable for venue hire are usually part of the project, the longer term income potential helps contribute to sustainability, showing again one of the many collective reasons that a project is carried out in a museum.

With funding opportunities available to redevelop museums, there is more reason for organisations to think about what the institution could be and how to get there. Change in organisations can be difficult and should be managed and fully considered. The IWM took this on board and Lees and Rayner considered the need for organisational change and how to go about that, alongside the capital project (IWM 2). The application process with the HLF, for example, is very extensive and staged. The organisation is interrogated and examined in terms of its finances, structure, ability to carry out a capital project etc. This in itself is a helpful 'health-check' for museum organisations and, again, identifies the relationship between museum types and their ability to carry out and their approach to projects, as well as what they need structurally in order to do so. The area it is difficult to cover is the cultural side of the organisation. Maslow's ideas of what motivates people were the basis of motivation theories and he considered physical and also emotional achievement and fulfilment (Crowther and Green 2004: 39) which is essential to consider in a museum when planning such substantial change. The physical change needs to include consideration for the organisational structure and culture too, in order for it to continue and be sustainable.

## **Sustainability**

Museums are affected by the conditions of their environment, including funding sources, and as such need to think more creatively and strategically about how to remain sustainable and more resilient in changing circumstances. Sustainability is not

only a financial consideration, but is also interlinked with the organisational structure and culture and being fit for its purposes. Projects can make substantial changes and contribute to the organisation becoming more resilient, but the ongoing and knock-on changes to the organisation also need proper consideration and management in order for this to happen. Museums have different shapes and structures, and some sit within much larger organisations, such as a local authority or a university. The Ashmolean is part of the Gardens, Libraries, and Museums (GLAM) section of the University of Oxford, and is collectively supported through funding from the University, Arts Council England (through the Oxford University Museums Partnership – OUMP), donations, trusts and foundations and research related grants. With the Ashmolean, the project had the issue of who the client was, as the museum is part of a larger organisation. Immediately it is clear to see that there is much more diversity in the sources of funds for the Ashmolean, which means, even though it is substantially bigger in size as an organisation and in terms of its buildings and collections, the sustainability and resilience for the organisation is greater. With some museums only having one or a few part-time limited sources of funding, their ability to work flexibly and take risks is less.

Funding changes can impact behaviour of organisations significantly, and comes through in project behaviour too. There have been large cuts over the last ten years from government sources of core funding. In 2011, many of the administrative bodies between the Department of Culture, Media and Sport (DCMS) and the non-national museums were closed and the funding streams they administered were distributed to the remaining entities. This meant that the Museums, Libraries and Archives (MLA) was closed and the remaining funding streams incorporated into Arts Council England (ACE). The funding through this stream directly funds core activity into some of the museums in the University of Oxford Museums group (Ashmolean, Pitt Rivers, Museum of the History of Science, OU Museum of Natural History, Botanic Gardens and Bodleian Libraries) and some shared services with a central team. The last round of funding covered 2014-18 and the next round has been announced, with a 10% cut in the level of funding for 2018-22. This leads to the point about project funding and its relationship with the organisation and regular 'business as usual funding'. It is true



that project funding is not mean to pay for core activities, however, what is true of some projects is that a well-designed project plan and funding outline can both match the needs of the project and the stipulations and parameters set by funding bodies, but also cover some aspects of an organisation's core activities. This can be through buyout or increased hours of particular roles, diversion of some staff onto project roles from core, project related activities that affect core aspects of the museum, such as collections, physical building spaces that are no longer fit for purpose. What this creates, however, is a false sense of buoyancy during the project period, where there are new roles created, activities carried out and the team is able to complete large tasks in a fixed time period. The hope with those staff is that a role will be found for them after the project ends. Some staff have an obvious project related title, such as 'Project Manager', 'Project Assistant', but others may not. A lot of expertise is gained during projects and that leaves with the individuals that move on after the project completion. The larger national museums are able to keep a lot of that expertise in their 'Project Management' Department, like the Victoria and Albert Museum, but the smaller museums are not able to do this. This means that the project knowledge and expertise learned is lost when the staff leave for more secure roles. The Museums Association Report 'Museums in the UK' (MA: 2017) also refers to project funding in the section 'Renovations' and states that 34% of the 453 respondents to the survey were indicating that they found it easier to find funding for new projects, and had carried out renovations during 2015-16. This shows that many are taking on capital projects rather than core funding 'in the current climate'. Fundraising is another area where again 42% of museums reported an increase in income from this area, and only 15% reported a decrease. This also shows how the museum sector is not only actively moving towards a more commercially focussed way of operating, but also increasing the diversity of their funding sources through fundraising. Projects can often be good opportunities to be catalysts for change in a museum.

### **Key Finding 3**

**Capital projects have the intention to change the physical aspects of a museum, but can also affect the organisation culture, and possibly the structure. Sometimes the impact on the structure is planned and sometimes it is not.**

The intentions for most projects often include changes to meet the needs of the audiences, but the staff need and organisation shape is not considered after the project finishes. It is also interesting that none of the interviewees made reference to 'going back to normal' whereas it is my experience that this is the case for some staff in the museum who are part of the organisation before the project. Often the organisation structure behind the project is not fit for purpose, and the shape of the organisation before, during and after needs to be designed in order to be developed into something that is more fit for purpose. Senior staff reflected more on the physical changes in the interviews and referred to the project in the consideration of the final product rather than just the way it was carried out. Mayhew (Ashmolean) highlighted that:

“after the project, we did not recognise how many staff we would continue to need and have.” (Mayhew 2016 Interview)

He described the organisation shape as like an 'iceberg' where we needed a lot more staff behind the scenes to service the new museum. This is why it is important to understand the motivation of why a project is being carried out, because of the ongoing costs after the project has been completed. Once again, it is not a case of going back to normal and the old ways of the museum, and this is reflected in the costs of the new organisation.

Consideration of the organisation shape also speaks to the reasoning behind why the project is going ahead; it is to change the organisation physically, and the theoretical culture of the organisation, which makes the project and the museum organisation often very closely linked. It also shows that many Directors are thinking about where they want the organisation to go to, but perhaps not the detail of the mechanics and how to get there. Physically, a lot of this can be done with project teams, taking the

staff with you, so that they are on board with the changes and become part of the new organisation is important. Otherwise, the risk is that the staff wait for the project to end and then wait to 'get back to normal'. Some projects need a differently shaped organisation to run it afterwards, so the 'getting back to normal' is not always possible or appropriate. The idea that the staff want to get back to normal and the senior staff do not always see it this way is significant, and is the reason that leadership and motivation theory will be explored in more detail in the next chapter.

### **Capital projects as a catalyst for change**

Museum capital projects are mostly carried out in order to catalyse and make change to the organisation. With the influx of potential funding from funding sources, museums have used this as an opportunity to create physical changes in the building, display spaces, conservation areas, and also instigate and lead to organisational change. This is not always the case, but with pressures of the 'need to change' or reinvent themselves, it is clear that museums have seen that they need to remain relevant and viable to other funding sources. As Jones outlined in his interview, it is important to have a clear idea of what the physical changes will be, and their implications on the rest of the museum experience, as well as the organisation operationally.

"We had principles – we wanted to work with the building – cluster visitor services – transition between galleries. But also we wanted to use different designers for different galleries." (Jones 2016 Interview)

As we have noted already sometimes projects can cover 'business as usual' costs as well as capital costs. This then brings up the issue of sustainability after the project ends. This comes into the interviews where they speak about increasing the size of the museum and the needs and structure afterwards (staff and size). It also comes in where smaller museums have faced cuts and their resilience is so low that their business plan for after the major project means a significantly smaller amount of staff for research, collections and audience engagement etc.. This also links with the dissatisfaction of project staff who are on short term contracts. This can be an issue for museum staff that are taken on by the museum on short term contracts for the

project, as they may not feature in the 'new' museum organisation afterwards. Not just the project managers, but the collections and display related staff at low pay levels. Nick Mayhew highlighted this and realised when reflecting and looking back on the project that there were several lower paid members of the team who tirelessly made the project come to fruition. At this point, he also mentioned that he felt that there were too many external project managers who were highly paid and produced a lot of paperwork and not enough people on the ground. This approach to working in the museum highlights the change in needs and that the way of working cannot always be covered by internal staff. Broadening existing roles in museums can be done but does need appropriate culture change within the organisation.

### **Cultural change**

The culture can also vary throughout an organisation, as there are 'departmental' cultures. Thorpe (Ashmolean Operations Director) referred to the Departmental structure within the Ashmolean as 'states', whereas Brown (Ashmolean Director) also referred to them in a similar way and talked about 'breaking down the barriers' of Departments.

"What the Ashmolean was a series of mini states within a state, some of which had very high walls. Which is why it is important to know what and why you are carrying out a project." (Thorpe 2016 Interview)

Brown questioned whether the major refurbishment project was the time to do this, but he felt that this would be too much at the time for the museum to cope with as an organisation and decided to keep the departments as they were and Mayhew (Ashmolean Deputy Director) was Keeper (Head) of the Coin Department at the time, and the Director asked him to take on the role of bringing all the Departments together and leading the collective curatorial input into the project. Mayhew described the potential change in the structure of the organisation in terms of departments as too much for the staff to take. With such big physical changes and the speed at which they happened, Mayhew reflected that it would have been too much at one time. Instead, additional staff were brought in to work specifically on the

project and combine them with existing staff who were 'seconded' to the project to work on particular work streams.

“[we] rearranged the structure related to new appointments and changes in [existing] staff, rather than it being planned and 'getting ready' for the project.”  
(Mayhew 2016 Interview)

However, what this can create is the feeling that there are those on the project, and those that are not. This level of non-engagement can be problematic, as capital projects will affect all staff in some way, and even if they are not working on it directly, ideally they should be aware of what is happening and supportive. Otherwise, it creates an 'us and them' culture within the organisation and also the 'sub-cultures' which is similar to the sub-systems described by Daft (Daft 2004: 523).

### **Agility of the museum organisation**

Looking at the museums involved in this research, it seems that the larger and national museums are able to work in a more strategic way with their projects and longer term plans. Smaller museums perhaps do not have ability to work in this way, because of the necessary funds and resources that they can move around and adjust in the organisation in order to move swiftly and, often, survive. This includes the necessary resources such as space and staff to not only run the museums, but also work innovatively in order to develop and work on projects. This does not mean that smaller museums do not act in an innovative and creative way, they often do and the Museum of Oxford, Museum of the Order of St John (MOSJ), and Compton Verney are just three examples of this. There are many other aspects of the organisation which may need to be considered too as well as the physical project – audiences, stakeholders, physical space. Organisations take risks when making changes, and all projects involve taking risks. Following the completion of the redevelopment of the MOSJ in London, which was another HLF funded project, Foakes (Project Curator and now Manager) spoke to me in his interview about the ongoing sustainability as well as the project approach. As an independent museum, there was a clear need to address issues of visitor numbers, offer, relevance etc.. Following the redesign and refurbishment, the museum now has beautiful galleries, good conservation conditions for its objects on display and in store,

and increased visitor numbers. However, following the project completion, it was clear, according to Foakes, that the museum organisational structure and culture still needed attention and to be actively redesigned too. He cited the museum as the 'catalyst for organisation change' and the way in which the museum could reposition itself in environment in order to be more relevant to its audiences.

"...the perception of academic curatorial roles, when what is needed is project management...The process was painful...and it was a reactionary change rather than proactive." (Foakes 2016 Interview)

It was two years after the project completion that organisational structure was reassessed as there were new needs in order to serve the larger audiences and role that the museum had developed following the project. Like Bramwell (Ashmolean) stated in his interview, there was more of a need for the soft skills and blurring between roles in order to create and overall more harmonious and less siloed.

"[the project] massively changed it...If you embark on a big capital project, do not underestimate the mirror image of that which is the internal change project that is needed." (Bramwell 2016 Interview)

At the MOSJ, following a review, there were redundancies, and reapplications for roles that were newly defined. The MOSJ now has a new structure to match its new role. This is an example of how a museum approaches a capital project for the multiple reasons of physical needs, ability to serve their audiences, but also recognising that needs need to change internally too. Other museums have done this by changing the lines of reporting in their organisation structure (V&A), or adding new departments as 'bolt-ons' to serve some of the new role of the organisation (Ashmolean). The IWM highlighted that projects became the normal daily programme.

"Change is and should be a part of what we are and what we continue to be."  
(Rayner 2016 Interview)

Ultimately, the reasons why museums take on capital projects include all these needs, but as shown by the examples here, are heavily influenced by their museum type and their funding sources and security.

#### **Key Finding 4**

##### **Project management process and approach varies depending on the type of museum.**

This issue is felt more in smaller museums than larger ones, where it seems that National museums deal with project management processes and project environments more easily than University, Independent and Local Authority museums. (Larger structure, silos, more staff).

Project management is a way to get a particular set of things done in a specific time frame. From the case studies and interviews here, we can see that the smaller museums rely very heavily on external project managers, but the larger, national museums also develop a project management collective in-house too. Bringing the skill set into the museum both saves money, and also means that the museum can have more control over the process.

Looking at the interviews, it is possible to see that the interviewees all explore capital projects through their understanding of the museum organisation, rather than project management theory or process. The people interviewed referred to the 'why' and 'what' rather than 'how'. The process of project management was selected depending on the size of the project and this varied depending on the type of museum. For example, the larger national museums would incorporate construction, design and redisplay together and rely significantly on experienced external project management expertise to support internal project managers. This was the case for the V&A FuturePlan, until they brought the project management and design expertise in-house. Mark Jones made the decision with the British Galleries that they would be developed by the museum, which meant that the amount of resources needed for each project was less than the projects before. This meant that the Medieval and Renaissance galleries were the same cost as the British Galleries, even though they were completed ten years later (V&A 1: 8). The V&A also ensured that its Project Approach was clear and had a document on their website outlining the Project Roles and Structure for their programme (V&A 10). This document outlines a similar structure as illustrated in Chapter 6 (Open Project Management (OPM): new creative and context-based model).

However, the creation of a Project Management Department, in some ways, creating its own silo within the Museum. In the Project document (V&A 10), the Project Team included staff from all Departments (Curatorial, Conservation, Security etc.) which established a matrix type structure within the organisation (Drucker 2007a: 56-57).

The Imperial War Museum (IWM) had a similar approach, but spoke more positively about the addition of experienced external expertise and that the museum would aim to include more and at an earlier stage of the project for the next phase (IWM 2: 5).

“Several of the people who had done IWM North and Churchill War Rooms were still in the organisation...so they have the institutional knowledge and she knows how to get people to buy in (from the organisation)...we also had some external help bought in to support on the ground with finishing and clerk of works..... We put them on the staff so that they were one of us.

(Lees 2016 Interview)

For other smaller museums, the project management approach varies between external and internal, but always seems lean on the external project management roles. For example, the Museum of Oxford has a freelancer, part-time project manager, and the Ashmolean had several staff reallocated to the redevelopment project, but none of them had any project management qualifications or training, although they were very experienced museum professionals (Ash 2007). The rest of the project management was bought in through project management companies, including MACE for the construction of the new building, and Cultural Innovations for the redevelopment end-to-end process (Ash 18 & Ash 21 & Ash 26). However, as Bramwell (Ashmolean) pointed out in his interview that although he was external, their approach felt different to the museum:

“Our role was as an external company, but the museum treated us as internal staff.” (Bramwell 2016 Interview)

The project management approach for both the IWM and the Ashmolean involved a combination of internal and external project managers and team members. However, what is clear is that the IWM had focussed on the museum as an organisation and



identified where they wanted it to go, and how the capital project would fit into that. The project was evaluated by Rayner and clearly outlined in terms of lessons learned and successes that they could build on for future projects (IWM 2). For the Ashmolean, the senior staff had clear roles and remits including fundraising, operations, curatorial and collections (Ashmolean 8 & 9). However, project management approach was predominantly led by external project managers for the capital projects and content coordinated by internal and seconded staff. For the Ashmolean, additional support was requested at a late stage in the project from an external company called Cultural Innovations (Ashmolean 21). Following the completion of much of the major redevelopment of the Ashmolean, a document was outlined to address the issues of a Project lifecycle (Ashmolean 28), but the issue lay with the fact that project management and project managers were seen as temporary. This can also be seen in the regular movement of the Project Team between 2006-2010, which will be discussed in Chapter 5 (Museums and their Environments: structures and response). Much like Lees and Rayner had concluded in their report (IWM 2), external expertise is needed in combination with the skills of staff in-house. However, this is a significant additional cost. Ideally, if the museum organisation can benefit from skills learning from the external team, this will be better in the long term, but would mean that the museum would have to treat project management as long-term, rather than temporary.

From the case studies and interviews here, we can see that the smaller museums rely very heavily on external project managers, whereas the larger, national museums use them too, but also bring together a project management collective in-house too. This is not only a cost saving exercise, as outlined by Jones (V&A 1: 8) but also a way in which the museum can have more control over the process and also the creativity development which is an important part of museum projects. During a major project, the museum organisation and leaders are focussed on the vision and the idea and end goal. It can be seen to be more like a big ship liner that moves silently but consistently. Those that are on board and work on it cannot stop it moving on their own, but collectively, they can work together to maintain and navigate it. This is what a project manager's role is – to coordinate the team within the museum and project staff, but it

is the Museum senior staff members who will keep control and ultimately the leadership, and final say. Organisations are all in open systems and, therefore, in constant uncertainty. In order to deal with the uncertainty of aspects outside of the organisation, organisations can create 'buffering' to protect themselves from it by bringing the uncertain areas to within the organisation or allocate resources to deal with those particular areas (Pugh & Hickson 2007: 64). This is usually sales or something commercially related, but it can include project management so that the organisation keeps more direct input of the project and process. Ultimately, it is getting the right resources in the right order, place and at the right time for the right price. It is important in museum projects to make the sum greater than the parts involved. People make projects happen, and well-managed groups of people with a clear common mission and goal-orientated approach to projects will be more collective, less siloed and have more ownership and motivation for the project. This was a main point made by Lees (IWM) regarding her approach to projects in the Imperial War Museums. She was asked why the museums were carrying out capital refurbishment projects when there were more mundane issues including that 'the roof was leaking.' Like Jones (V&A), Lees highlighted that the project programme was part of the 'core work'.

"...difference between projects and 'core work'...these silos need to be broken down... We are an organisation who is delivering a series of objectives to achieve our aims...If you are not a learning organisation and learn as you go along, then the gulf will increase."

(Lees 2016 Interview)

What I can conclude from this research is that motivation, common goals and purpose in museum projects is common across all museum types and staff, but how that is managed in a capital project is different depending on the museum type. Mayo refers to the consideration of workers' emotions and their social groupings, and the self-esteem and job satisfaction are referred to as an important aspect within behavioural and human relations theory (Crowther and Green 2004: 35). As Martin Roth said in the interview, it is the collections which are the 'real thing' and is what makes the visitors come, 'and it is also the reason we work in museums' (TORCH 2014). Providing strong

leadership from the museum senior staff is important, but so is good and effective project management.

Another way of seeing how the museum type affected the project management approach was where the interviewees referred to when the projects and project management went wrong and how things could have been improved. Mayhew (Ashmolean) drew upon the areas which were an issue and had been much underestimated during the project and had an impact on the delivery of the rest of the project. The decant of the objects from the museum on display and stores before the demolition of the old parts of the building was done at a fast rate and during it, there were oversights on the accession numbers of some of the objects. Lees & Rayner (IWM) referred to issues with the quality of the external contractors and risked delay in the delivery of the project, which had a very specific deadline because of the Centenary of the First World War (IWM 2). Again, this shows that the reliance on external contractors and project managers is not always the right way, and that a knowledgeable team internally which is complimented by external expertise is more adaptable and responsive to issues that come up with capital refurbishments. The ownership internally of the museum project management is something that museums should move more towards if they have capacity, so that there is a new breed of museum project managers that have a portfolio of experience in different museum project environments. Again, going back to the main finding here, this is very dependent on the museum type and larger museums are able to make these accommodations to their structure and staff, like the National Museums and to a certain extent, the Ashmolean. But smaller museums, like the Museum of Oxford, with only a handful of staff will continue to be reliant on short term and external freelance staff. As their museum fits within a local authority organisation, they will also be able to call upon to a certain extent the staff in the wider Council operation.

The University museum type of organisation meant that there was a real focus on the academic quality and research for the displays, and this affected the project management approach that was taken. For the main Ashmolean Redevelopment, Brown (Ashmolean Director) felt strongly that one of the main selling points of the

Ashmolean was the academic leadership of the displays and collections, and that it was important they were not 'dumbed down' for the public, but were still physically and intellectually accessible. Brown compared this to the Kelvingrove Museum where the curators were less involved. He was absolutely clear that the curators of the Ashmolean were not just a source of raw data, but rather were able to consult and collaborate with the combination of education, interpretation, design and text-writing specialists to co-create the materials for the displays. This produced a very good result, however. As I was managing the next stage of the project process, I know that this initial part took much longer than was anticipated and allowed for. According to the original project plans issued in 2006 (Ashmolean 13) this stage should have been complete in around 6 months earlier, however, I was receiving final designs sometimes as close as two weeks to the installation date (Ashmolean 26). The time I had for the management of the collections for display, once we had got them through packing, conservation and mountmaking processes, was very squeezed. This also links with what Bramwell (Ashmolean) said with reference to needing more time at each stage to think more.

"We were building it before we knew what it was...We should have waited a year before we started building so that we knew what was going into it."

(Bramwell 2016 Interview)

Not all processes, like the creative process, are linear like project management, and an allowance for this should be incorporated wherever possible. Museums are creative, research and educational organisations and this links to the theories of culture types by Handy. We can see from the case studies and the approaches to capital projects, that museums are rarely culturally pure and are a mixture of the power/club, role, task, or person cultures (Handy 1990: 83). The way that the museum evolves its culture can often reflect its response to its environment and its role, but this should also be reflected and considered for its structure and project management approach.

### **Limitations of the study**

It is important to highlight that there are potentially a number of limitations with this study. The data set is limited to the people I interviewed and, therefore, limited to a senior management perspective and response. The limitation is there, but it is also possible to expand and show the relevance of the findings into other areas, as the implications and generalisations may be applicable to other areas in museums, such as operations or management and restructuring. It is also a relatively small sample, although the group themselves have a large amount of experience in terms of years, but also with reference to delivery of a significant amount of capital projects in museums. Another limitation is that the interviews should be conducted in a way that guides rather than leads the interviewee in order to get a fair and balanced response. This was addressed in the methodologies whereby a semi-structured technique was used and open questions with follow ups, rather than direct and leading questions. Other limitations include the types of museums the interviewees represented. This became apparent once I carried out the first round of interviews. After this first round and the initial analysis, it was clear that additional interviews would be beneficial to the study, therefore, a second round was carried out to accommodate for this. Coding the data also has its limitations, but it has been combined with and used as part of the narrative and analysis rather than just being used on its own.

It is important to also highlight that it may be perceived as a biased view because I have focussed on senior museum staff (Trustee, Director level ) for this interview pool and results would potentially have been very different if I had involved other members of the museums and projects, such as departmental, collections staff etc. That is currently out of scope for this project, but it is important to understand and highlight the potential issues with the range of data collected when analysing it. The fact that project management methodologies and theories overall do not feature as much in the narratives from the interviews is in itself an interesting point to note. An understanding of the mechanics of project management, as well as organisation and motivation theories could possibly make the role of the Director more effective in terms of leadership and understanding why things at a higher level are not working effectively. Interviews are good to gather direct and first-hand accounts from the

individuals themselves, but the interviews, for the most part, took place after the projects were completed. The interviewees underwent a reflective and self-reflective process in order to do the interviews and consider the projects once they were 'successfully' completed.

## **Conclusion**

In conclusion to this chapter, the themes that came from the interviews helped to bring together the key findings. Current project management methodologies do not take into consideration the structure, culture and environment of museums and there is an opportunity to develop a form of Open Project Management (OPM) which builds on the theoretical base of organisational, motivation and leadership theories and project management methodologies, which cater for the shape of the museum organisation. The findings and discussion from the fieldwork indicates that museum capital projects and project management need to consider the differences between each type of museum organisation. This includes the staff and their skillsets, funding opportunities for capital projects, and the organisational structure and culture. The shape of museums often develops naturally as people leave roles or time passes and new needs are identified, but projects often bring about rapid change. During this time, the shape of the organisation is overshadowed by the capital project, however, the shape of the organisation before, during and after can say a lot too about the museum as an organisation, as well as how that shape came about. The existence of theory of organisations is large compared to that of project management, and more specifically projects in museums.

The findings presented in this chapter illustrate the understanding of theory and practice in museum projects, and the potential for further development in the field to better serve the gaps in the theory and practice of projects in museums. This is something that I will look into further in my next chapters. There is a clear gap in the literature and approach for a museum specific theoretically based practical approach for capital projects. The most appropriate approach depends on the type of project, resources, museum type, and organisation shape. This new approach would address the specific nature of projects in non-profit organisations, most specifically museums.

In the next chapters, I will investigate the theoretical basis of museums as organisations, museums and their environments, and museum project management. By taking all these variables into account, as well as the influences of the environment including funding, social and political changes, I intend to better understand the theoretical base and potential future approaches to capital projects in museums, and in relation to that, sustainability and change in museum organisations.

## **CHAPTER 4**

### **Museums as Organisations: culture and behaviour**

#### **Introduction**

This chapter continues the exploration of the themes and key findings from the results of the fieldwork and data analysis in the last chapter. From the last chapter, the main areas that will be further explored are how museums act as organisations, based on organisational theories; how their internal culture affects their behaviour during capital projects; organisation and staff behaviour in relation to leadership and motivation theory; and how a flexible-framework approach could build on these theoretical and practical bases and develop a more museum considerate approach to project management – Open Project Management (OPM). Ultimately, the process needs to understand and incorporate that people with purpose make projects happen. These outcomes will build on the key findings and be further investigated along with evidence from literature and museum primary documents, in order to ascertain whether this new data supports or contradicts the existing information.

In the last chapters I explored, outlined and defined the methodological approach to the thesis research fieldwork, explaining the use of a combination of case studies, semi-structured interviews, and documentation from examples of capital projects in the museum sector, as well as related theoretical frameworks. This was followed by the research findings and discussion for my fieldwork interviews and the key findings that came from that. In this chapter, the theoretical background related to organisations, motivation and leadership will be incorporated with some of the research findings. In order to understand projects in museums, it is essential to have a basis of what a museum is as an organisation, which I will investigate more in this chapter, as well as how it reacts in its environment, which will be explored in the next chapter.

Key points I explore here are:

1. The internal culture and behaviour of a museum determines how it acts during a project.



2. The museum organisation culture is also interrogated by and interwoven with motivation and leadership theories and that influence how projects are carried out through an organisation.
3. In order for a project to be worked on throughout a museum, it is important to have a shared mission and shared goals, and therefore have a common-goal approach to projects.
4. The role of museums as organisations contributes to why they go through capital projects.
5. Project management in museums should have a flexible-framework that incorporates consideration for the culture and behaviour of the museum and recognises that creative organisations operate differently to commercially focussed organisations.

By looking at the key definitions and reviewing the literature to date, I aim to explore the relevance and links of organisational theory to non-profit organisations and museums specifically, and how this relates to project management in museums in capital projects. The chapter concludes with an overview of the theoretical approaches to management in organisation studies literature, and highlighting the relevance to museums and potential ways forward. The approach I have used follows best practice from social science research including autoethnography, anthropology, and organisation related studies. Following on and building on that, this chapter will investigate the literature and theories from organisational studies and explore the aspects of profit and non-profit organisations, and the theoretical basis and underlining of them.

Capital projects, as well as contributing to and developing the physical environment of a museum, can also bring about organisational change. With the economic downturn in the previous years, research into organisation and management has increased with a focus on organisation theory and related issues in organisation structure, performance and output (Pettinger 2012, Leigh 2012, Hatch & Cunliffe 2013, Gray 2015. Although significant work has also been done on organisational change and effectiveness in museums (Abraham and Griffin 2000 & 2007, Holmes and Hatton 2008, Griffin 2008, McCall & Gray 2014, Parsons 2014, Sutter 2015, Nielsen 2017, Ryan

2017) there is still a lack of UK-related material to incorporate lessons learned from museum capital projects. This current material highlights and concludes that there is a real need for more research into management and organisational behaviour in museums and I would suggest that it could also build on the knowledge and practical experience from project management in museums over the last decades.

One of the main things that seems to come out from the literature review is that there are few theoretical frameworks for museum project management, however, I have explored organisation and management theories to investigate the relevance to museum organisations and then projects. The theories that are the most influential and relevant to museums and projects will be highlighted here, and continue onto the specifics of organisation culture and behaviour. Overall, the discussion follows a mostly historical order, beginning with Taylor's scientific theories and onto the more 'human' focussed management approaches. What can be concluded is that the theories of organisations and management evolved over the decades to include a more 'human' focus and understanding. This is not only for the well-being of the workforce purposes, but also for efficiency reasons, whereby the understanding is that a happy and supported workforce are more hardworking and committed. This is interwoven with leadership and motivation theories. Leadership is about leaders, and motivation also includes the rest of the organisation. There are clear differences between profit and non-profit organisations as discussed by Drucker (2007) and Griffin (2000, 2007, 2008), and it is clear that a well-considered mix of approaches and considerations from both environments is needed in order to develop museums as organisations that can be more sustainable going forward, as well as developing an agility needed in the current political and financial climates to carry out projects.

### **1. The internal culture of a museum determines how its behaviour during a project.**

Organisational theory is based on concepts and influenced by the environment it is in (Hatch & Cunliffe 2013: 6). When looking at museums and galleries as organisations, then it is necessary to look at other organisations and the management and organisation theories that go with them (Fopp 2001: 124). The culture and behaviour of museum organisations determine how projects are received, carried out and

embedded. Weil talks of the role of the museum and the changes responding to the external environment, which in turn affect the internal culture, and that the criteria to judge a 'good' museum are in fact the same as for any other non-profit organisation: is it purposive, capable, effective, and efficient (Weil 2002: 7). With museums using public funds, including for their capital projects, their role is more focussed on serving the public, and their internal culture adapts accordingly. Clarity is needed for the role of the museum, as Weil describes that the 'inevitable multiplicity of their purposes' that can lead to a discord between the internal culture of the museum and its mission (Weil 2002: 17). Effective and regular communication inside and out to all stakeholders is essential, and projects need to carry this through into the project processes too. The direction that the project is leading and taking the museum should be clear, and relate to the common goals and mission of the organisation. It is also important for all organisations that the theories that affect how they are established, created, run and change are fundamental to our understanding and enable them to make well informed decisions. Here, it is relevant to refer and link to my finding in the previous chapter that leaders do not always understand staff expectations of going back to normal after the project and that perhaps too much theory and practice relies on the idea of communicating downwards and there is not enough listening, understanding and responding to staff expectations and anxieties about the project. This certainly correlates with my experience of working on different museum projects and the anxieties that are felt by some staff. The belief that practical activity cannot be 'theory-dependent' also influences opinion that some teaching of management and organisation is too 'academic' and 'theoretical' (Gill and Johnson 2010: 40). Gill and Johnson state that this is also similar to the opinions of the Ancient Greeks Plato and Aristotle, 2,500 years ago (Chiu 2010: 40). They argued that knowledge was acquired for its own sake rather than for a purpose and that theory was divorced from practice. However, theories are a means by which we generate expectations about everything (Gill and Johnson 2010: 40-45). For museums, by understanding organisational theories, there is then a basis to understand the specific aspects of museums as organisations and how they react during changes, including those in their external environment. Following this, how the organisation acts and responds during projects can be better explored and understood. Griffin highlighted the range of analysis of

'museums as organisations' was lacking and required more focus on the role of leaders of museum organisations in the changing external environments (Sandell & Janes 2007: 106). I would add to this that the role of project managers and projects themselves also requires and would benefit from a more in depth focus in research terms.

Looking more broadly at organisations, and organisation and management theories, the relevance and links to museum culture and behaviour is clear. Management and organisation theories have developed over many years and been researched extensively (Moore 1994, Crowther & Green 2004, Hatch & Cunliffe 2013, Morris 2017). Initially these studies looked at increasing the production levels of factories and similar organisations where produce could be quantified predominantly. Following this, it was discovered through this research by theorists, including Fayol (Hatch & Cunliffe 2013: 27) and the sociologist, Weber (Hatch & Cunliffe 2013: 94) that the opinion and feelings of the workers was an important factor affecting the volume of production. With the breadth of external forces affecting organisations, understanding further areas of organisation theory such as organisational culture and behaviour is essential, because this determines how a museum organisation will act during a project. Project management and the act of temporary change in museums has not been extensively explored in a UK context, which is why, building on these theoretical bases, I will look further into organisational culture and behaviour in museums.

Organisation culture is an organisation's collective overall experience, accepted beliefs and assumptions, which is also influenced by the wider political, cultural and economic environment in which the organisation exists (Pugh & Hickson 2007: 96). For museums, this can be seen in the mission and role of the museum, but also in the internal behaviour of the museum staff (Fopp 2001: 124). As shown in the interviews, some museums worked in a more collected and connected way, as described by Lees and Rayner at the Imperial War Museum. This was following changes in the structure in preparation for the new funding model and new way of operating as an organisation. The culture can also be seen to be unreceptive when projects are going ahead, as shown in the interview with Collins at the British Museum. This was due to a combination of limited internal communication channels in preparation for the Zayed

National Museum project, and the sheer size of the British Museum, which meant that the project did not reach all areas and was felt not to affect them. Thorpe also described the Ashmolean as a combination of 'states' within the organisation, which can sometimes go against creating or developing a culture of community and working effectively across internal divisions. In order for projects to work most well in an organisation, the culture needs to have some commonalities across the differences. These differences could be the different departments or subject areas, but they need to come together in certain areas in order to take on the changes that come with a project.

"Having a clear plan from the outset is needed...once the project was complete, what was it meant to have done." (Thorpe 2016 Interview)

The culture of the organisation is an important factor in determining how it can work most effectively. The collective experience and accepted views within an organisation culture means that an organisation's internal processes can work more smoothly, as those working within it have a level of expectation and prior knowledge. Modern organisations are situated within a global environment with a wider range of variables and reliance on the social, political and economic situation in which the organisation sits. The experience of the managers and the collective knowledge of the environment in which they are working will enable an acceptance and engagement in management approach (Hannagan 2008: 15).

With all organisations, including museums, cultures are made up of assumptions based on experience in that place, time and situation. Therefore, as my experience suggests, it can be difficult to carry out a new methodology, approach or process which has not been done before and the people in the organisation are not taken with the new ways, rather than a top-down approach. Organisations with different structures and cultures all have the requirement of needing to be managed (Pugh & Hickson 2007: 96). The right choice of project management style needs to be chosen for that specific organisation. Ensuring that it fits with the organisation culture is one factor that needs to be taken into consideration at an early stage and an awareness of the culture and environment is essential. Therefore, project management in a museum needs to take

into consideration the structure, culture and environmental influences on the museum as an organisation. Change in any environment needs to be managed and the understanding of how management styles work in particular cultures will determine how successfully it is accepted by the staff. The Museum of the Order of St John had to undertake major changes to the structure of the museum in order to make it fit the needs of the new organisation, as described by Foakes, the current Manager of the Museum. The changes were made after the capital project was completed, but Foakes said that the museum had learnt a lot through that process, which meant they were better informed and prepared as an organisation for their subsequent projects.

Better understanding of the culture of a museum organisation can determine how the people working within it react to change and developments such as projects. Classical theorists such as Taylor and Fayol and sociologist Weber may see an organisation's structure as a machine and it has been shown through the development of administrative, human relations and behavioural theories that the 'machine' is dehumanising (Pugh 2008: 232). As it has developed, modern organisation theory focus more on the human aspects of management and organisations. Organisational culture can change and develop because of the people that make up an organisation. People determine how open and receptive the museum is to a project and change. The recognition of the importance of people in an organisation can be seen in the development of organisational theories. What cannot be seen at this point is the consideration of museums as creative organisations in this literature. In museum studies literature, there would be great benefit in deeper investigation into museum theories of organisations and the motivation of the people in them.

One of the earliest defined types of organisational theory was 'scientific management', which came about at the end of the nineteenth century and came from factory type organisations. 'Administrative management' developed at the beginning of the twentieth century and looked at organisations as a whole and in turn moved onto 'bureaucratic management' (Hatch & Cunliffe 2013: 94). This involved developed structures, reporting lines, rules and accountability which can be seen as impersonal, but can still be viewed as the basic organisational structure for many organisations

today (Hannagan 2009: 273). The administrative approach then led on to more people focussed and human relations approaches, which includes behavioural theories. Organisational theory over the last thirty to forty years has developed to enable more flexible and reactive organisation structures in order to accommodate and innovate according to the increased external influences and changes that have come with more global interaction (Pugh & Hickson 2007: 45). Due to the necessity for adaptable types of organisation, contingency theories, which incorporate changeable elements such as sales etc. into the organisation, were developed in order to deal with the changing environment and these 'modern day' organisations are known to be learning organisations (Daft 2004: 121). The theories of management and how they relate to museums is also an important and underdeveloped area of research in this field, and further understanding, along with autoethnographical accounts from museum professionals, including those on projects, will bring together the theoretical and practical developments to benefit museums in practice and the study of them.

History plays a large part in the design and cultural behaviour of the organisation, due to obligation, roots, and justification. Organisations have different cultures because they are communities, not machines and we have moved away from the engineering model, as previously discussed in scientific organisation theories (Handy 1990: 85). With this in mind, Handy developed definitions to identify the different types of culture, again being aware that there are mixes of cultures in organisations too. While looking at these types of cultures, it is also important to keep in mind that no organisation is culturally purely one of these, nor should it be, and often they are influenced by many factors such as their size, work-flow and type, environment and their own specific history. This will be considered in the fieldwork. Voluntary and non-profit organisations can often be seen as 'culturally confused' because of how culture links with the morale and motivation of the people involved. The values, beliefs and assumptions can often vary so much that they are not always a 'cultural fit' (Handy 1999: 77). This mix and diversity can be a strength, but also lead people to think wistfully of the 'good old days' as memory makes things seem simpler in the past, particularly when they have gone through projects and significant changes. It emphasises the feeling of wanting to 'get back to normal' again. In order for an

organisation to be as effective as possible, recognising mixed cultures within it is a good starting point, followed by continual rebalancing depending on the needs of the organisation. For example, wise organisations know that their culture is not set in stone and that a mix of cultures is not easy, but necessary. The word culture itself works well when discussing organisations, but it does have a different flavour in museums, as it suggests something that is old and longstanding. This can perhaps go against the desire to change, and it can in fact be a reason to keep something the same, for example, the staff of a museum may argue that their ways are their traditions and the way things should be done.

Organisational cultures are described as different styles by various theorists. Handy writes about a framework of culture types throughout his books on organisations, including voluntary ones, which highlights and concludes that there are different types of culture in organisations (Handy 1990: 83). Fopp, like Handy, looks at them as Power, Role, Task and Person cultures (Handy 1990: 85). Power culture relates to small adhocracy structures, which are known to be fast-moving and related to project management. The Task culture, is also task- and therefore, project-related. Role culture is related to bureaucratic structure and focusses on the role descriptions and related rules and regulations. This has the reputation of being a slow-moving type of organisation and is also how museum organisations can be seen. Person culture means that there is a person at the centre of the organisation, such as a research academic or similar to a barrister's chambers (Fopp 2001:161). This could also go some way to explaining some of the issues relating to the University museums and their organisation structure and the conflict of cultures involved, as described by Brown when talking about the capital project at the Ashmolean and the relationship with the University. He said that the curators in the museum had roles that were similar to the lecturers in the wider University, but their approaches to research had differing definitions, for example. This shows that there are often cultural differences within the same overarching organisation, even when working in similar areas. This is why it is important to have an understanding of the cultures involved in the museum when carrying out projects, so that there is an understanding of ways of working and motivation across the organisation and the project management approach can be



tailored to accommodate for it. For museums, as many other organisations, the culture of an organisation will most likely not be purely one type, but a combination and total harmony all the time is not possible, with conflict inevitable at some point (Fopp 2001: 170). Through the interviews, it was also clear that internally, some museums have different cultures within the same organisation, because of the structure of the museum. The Ashmolean has several departments that sit under the heading of 'Collections' which includes the curatorial departments and conservation, but then there are customer facing departments, that include the shop, exhibitions. The cultures are different across these diverse departments within the same organisation.

Organisations are now thought of as intelligent and knowledge creating, even though 'most organisations come across as pretty mindless' (Henry 2001: 117). The culture of an organisation is the collective consciousness and ultimately the sense of organisational achievement and what is needed to get there. Learning organisations are those that learn, develop, adapt and change within themselves in order to accommodate new environments, targets and roles. This is something that museums have certainly taken on board and developed with the help of projects, as shown when Glenbow restructured into eighteen functional departments and four divisions which were changed into six multidisciplinary units, thus allowing variance in structure, culture and behaviour. Museums, like all organisations, have a formal structure as well as an informal culture (Moore 1994: 10). Through the culture, it is possible to understand the patterns of behaviour that underpin the business and its activities and also the basis for the management style. Effective organisation cultures are positive and designed rather than emergent and a strong sense of mutual loyalty reflects the aims, objectives and values held (Pettinger 2012: 101 & 117). Another view is that the organisation provides opportunities for individuals to develop and be rewarded, as long as this process is adding value to the organisation with an idea of 'shared destiny' that develops collaboration and alliance (Hannagan 2008: 93). Management is about managing people as well as processes and consequently the culture of the organisation is an important factor to recognise, identify and work with. In order for any organisation to operate efficiently, the structure and the culture will determine

the processes and behaviour of the staff, as they will have similar background of previous experience over time and understanding of 'how things are done' in that environment (Hannagan 2008: 16). The culture can also include the belief that the individual has the power to influence, through personal empowerment, the bigger issues rather than focus on the constraints (Henry 2001: 102). The culture of an organisation affects how well it can adapt to change. For museums, their specific and bespoke environment is complex, with competing values, interests, and decreasing public funding (Janes 2013: 13). This was also described by Shaw (OUMP – University) in her interview.

“Public funding means that they have to explain where funding is going and report to DCMS....we are working towards milestones....and University wants and needs...[Museums] are amazing cultural spaces and spaces of great learning, but they are also spaces of real enjoyment and to be celebrated.”  
(Shaw 2016 Interview)

This also works well with the idea of museum project management acting like a flexible-framework that maps onto the museum organisation and works with the existing resources, collectively working towards common goals.

## **2. Leadership and Motivation theories**

Overall, my fieldwork for this research involved interviewing leaders in museums and so it is important to understand leadership and motivation theories in order to identify how these can help with my analysis of museum project management.

Leadership is essential in order to motivate people within an organisation to achieve goals by acting in a particular way. It is a key part of management which has its own area of expertise and approaches. Combined with good management, leadership can raise a worker's understanding and performance (Drucker 2007b: 138). The theories behind this enable us to understand and ensure that the leadership styles are appropriate for the organisation, by providing direction and making decisions on methods and processes in order to achieve their goals and objectives (Hannagan 2008: 40). Leadership styles are also closely related to the organisation culture and structure,

as well as how it acts in situations. The success of a leader is greatly dependent on the culture that exists (Hannagan 2008: 49). Managing change is also an important factor in leadership, because research into traits and behaviour of leaders shows that it depends on many variables, including the leader's personality, management style and organisation culture. Leadership is often focussed on by the media when a company is in trouble and needs to be 'turned around' (Henry 2001: 91), as if one person would be able to do this. Leadership is important and highlighted in these situations, but it is also needed throughout the lifecycle of an organisation's existence. Leadership of an organisation when that organisation is going through a project is also important and fundamental to the project being successful both for the external and internal stakeholders. Clarity, consistency, and competence is paramount in a leader of a museum project, in order to take the rest of the organisation with them.

When discussing leadership theories in museums, Davies refers to the lack of satisfactory and appropriate theoretical frameworks for museum leadership (Sandell & Janes 2007: 255) including contingency theory as one of the four theories (trait, style and attribute are the other three). Contingency theory and approach puts forward that there is no one way to best organise an organisation and that all sub-systems should be aligned to maximise the organisation in a particular situation. This suggests an internal organisational agility and ability, which is not always possible for all museums as this is not the situation they are used to. This is why the preparation for a capital project should also include the appropriate time to build capacity internally in the museum as an organisation. This should take into consideration all internal and external conditions, such as the background and experience of the managers, the workers and the situation, and organisation culture in which it sits (Hatch & Cunliffe 2013: 32). Based on these 'forces', the manager should decide what leadership approach to use, such as autocratic or democratic (Hannagan 2008: 46), which I would describe as top-down or bottom-up approaches. This is because 'no leader is an island' (Henry 2001: 139) and they should always bring their organisation with them. Contingency approaches mean the 'best fit' theories for the organisation and leadership and take account the relationship between the organisation and the external environment and it is also necessary to change the leadership style according

to the changing environment and situation of the organisation (Pettinger 2012: 187). For museums, contingency approaches can be used to highlight areas where directive and prescriptive styles of leadership and management are appropriate and necessary to work with the culture of the museum (Pettinger 2012: 187).

The ideas of leadership often become compartmentalised and segregated in order to identify the different possible styles. These include corporate, strategic, operational, team, and problem-solver and crisis leader. In these different areas, leaders can vary their approach depending on the variables of the situation, such as the needs of the staff involved, the environment of the organisation and the current situation. Fopp described it as a theory that had not been tested, when writing in 2001. Since then, in the number of museum capital projects which have been carried out, arguably in response to the external environmental pressures, this organisational theory has been tested throughout, although it may not have been recognised. From a leadership perspective, a contingency approach forces the manager or leader to do a systematic analysis of the situations facing the museum in order to make a plan going forward (Fopp 2001: 28). Effective leadership is essential to take forward a plan and change in a museum organisation. What we can see from the case studies is how the museum directors use project management methodologies to ensure the museum absorbs the outcomes of the project, rather than treating it as a 'bolt on' - something separate. As Nick Mayhew (Ashmolean Museum) said:

“What was important was engaging everyone inside in the organisation, as far as one could, in the overall purpose [of the project]”

(Mayhew 2016 Interview)

One of the findings was that the senior staff I interviewed had similarities in their backgrounds and journeys to museum senior management, such as educational background, gender, and types of museums worked in. The Interview group I had was not large enough to say definitively, but it does enable me to draw some thematic conclusions based on the fieldwork. With this in mind, both leadership, and more specifically trait theories, are interesting to take into consideration. The personality traits of different types of leader determine whether they are a good leader

(Hannagan 2008: 43). Sometimes there are even physical traits associated with leaders and certain stereotypes: for example if someone is tall, they may be seen to be overbearing and aggressive. I would hope that these stereotypes and reductive examples are not an issue or barrier to anyone becoming a senior member of staff of an organisation, should they wish to. The culture of an organisation and its environment also determines which traits are considered best for a leader in a particular organisation. This can be an issue for equality and diversity in the workplace if bias can contribute, for example, to who is considered a good leader, much like the 'glass ceiling' for women for example. Overall, however, it is believed that there is no 'winning combination' of personality traits which will make a good leader (Hannagan 2008: 43). Drucker states that leadership cannot be taught or learned, even though leadership is of the utmost importance. Essentially, leadership is somewhat dependent on an individual's personality, attitude and aptitude (Drucker 2007b: 137). It is interesting to explore the behaviour of leaders in differing situations, which is particularly interesting for project management in museums. Is it necessary that the leadership is different during a project? Management does not create leaders directly, but it does create the conditions and situations in which leadership can be brought forward (Drucker 2007b: 138). During projects, there are often, many new situations that an organisation finds itself in, which means that the leadership should recognise this and take it into consideration. 'Emotional intelligence' (self-awareness, self-regulation, motivation, empathy and social skill) as well as a general level of relevant skills is what is also considered important for a good leader. (Henry 2001: 127). Leaders who took 'people' and 'production' into consideration were considered the best leaders, as concluded by Stogdill and Coons in the 1950s. By developing a mutual trust with workers below them, leaders could ensure 'buy in' from them and two-way communication. 'Production' can be seen as anything which the organisation is producing or, in fact, the 'task'. It is also clear that leaders that take into consideration the well-being of the people involved have the best long term success rates, particularly in terms of staff turnover and satisfaction rates.

Leadership theory references the leaders and how they lead, but what is equally important in museums is motivation as this relates to staff and beyond the leaders.

Why are museums such popular places to work and what motivates staff to commit to them when they are known to have highly sought-after, low-paid roles, which are highly competitive? Theories of motivation have been extensively studied since 1945 (Likert (1903-1981), Herzberg (1923-2000), Maslow (1908-1970), McGregor (1906-1964)) with the overall aim of establishing and exploring what motivates people within organisations and, therefore, bringing about more effective management within organisations and consequently, more productive organisations (Pettinger 2012: 328).

By understanding the roles of the departments in the museum in the broadest terms, it will be possible to understand their capability to adapt. By including consideration of the ideas of human relations studies, it is possible to see more clearly how management, and those being managed, are affected by change in a project. One of the main differences between museums and other organisation environments, such as IT, construction and engineering, is their organisational culture. Museums are creative environments and the people working in them have a particular culture that encourages communication to the public, and new ways of doing so.

“...human relations and motivation theories are about peoples’ behaviour and feelings about their informal rather than formal organising.”

(Crowther and Green 2004: 35)

There are similarities in museum organisation structure with other types of organisation, but it is their mission to communicate and how they work to achieve it which is the difference.

By looking at a museum’s organisation structure and culture before moving into a project, we can better understand why people react as they do during change. Griffin and Abraham talk about a shared culture when looking towards the future of museums (Sandell & Janes 2007: 122). The people that work in museums have different motivations and quite often are not financially motivated by the role, but due to interest and passion for the collections and place. It is widely recognised that in the UK at the time of writing wages in museums are low and that funding for positions is insecure, yet museum work is still highly sought-after and advertised positions have many highly qualified applicants. More specifically with reference to museum

managers, Holmes and Hatton ask in their commentary paper why management as a 'practice, skill and focus' has maintained such a low status within the UK museums sector (Holmes & Hatton 2008: 111) and there is still a gap in the market for this approach and work in the time since this was published. This is important to consider with small museums, and should be an important consideration when applying project management theory and practice. Projects in museums work in both open systems (affected by external influences), and have their own internal organisation culture. If management itself is not clear within an organisation, then project management will not sit comfortably within the organisation.

When Mayo tested his theories on the effects on productivity within an organisation in the 1920s and 1930s, it was in various working environments with different external factors (Hatch & Cunliffe 2013: 200). Mostly these focussed on financial- and factory-related productivity, but the consideration of motivation and leadership theories and emotional labour relates particularly to museums. The consideration of workers' emotions and their social groupings and the importance of self-esteem and job satisfaction are referred to as an important aspect within this theory. This is a significant part of working within a museum environment. Financial reward is not the main focus of the museum staff that are involved in a project, although managers will of course have to keep budgets and targets as a high priority. By focusing on the importance of the workers' social and psychological needs in the workplace, the human relations approach enables change, in this case projects, to take place and also enable a good working environment after the event. One aspect of this theory which should be kept in mind is that it assumes that there are often common goals at all levels of management and the organisation, whereas museums organisations can often have a mixture of culture types. For example, Collins (British Museum) spoke of the 'us and them' feeling between certain departments in the museum, and both Thorpe and Brown (Ashmolean) spoke about the silos and feeling of 'states' at certain times during the redevelopment.

Motivation theories explore different aspects of the organisation and ask why it acts in the way it does, both individually and as an organisation. Motivation theory originally

was developed as a method for managers to control an ever increasing workforce and ensure maximum productivity, but as explained above, now includes more focus on the people. Abraham Maslow's ideas of what motivates people were the basis of motivation theories and he considered the physical and also the emotional achievement and fulfilment of them (Crowther and Green 2004: 39). Maslow created a 'hierarchy of needs' (1954) in which he identified five motivating factors: physiological, safety, social, self-esteem and self-actualisation. However, his theories did not take into account the individual differences between people, such as age, culture etc. which can affect an individual's needs (Adair 2011: 74). These areas were kept in mind when I carried out the fieldwork, and all of the interviewees referenced an aspect of these. Shaw (Oxford University Museums Partnership), Parissien (Compton Verney) both specifically highlighted that they were more than happy to help with my research because they had received help and those in the museum world should support and learn from each other. This ability to give support and share experience and expertise is important in projects too. Sharing experience of running museum capital projects means that the field is stronger and more varied, which means it will ultimately be more effective. This again highlights that the museum environment is different to other management situations because the motivation and goals of museum staff is not always purely for financial results.

Related to Maslow's hierarchy of needs, museum staff need self-esteem and self-actualisation and there are many people that are drawn to work in museums because of their creativity and their unique type of non-profit organisation. Douglas McGregor developed the two-factor approach of Theory X and Y and published it in 'The Human Side of Enterprise' in 1960. These two theories demonstrate that managers' management style depends on the assumptions they make about human behaviour (Adair 2011: 76-77). Theory X is the traditional view of direction and control and assumes that people dislike work and will avoid it if they can. Around this, the main concerns of the staff are personal (salary, job security) and, therefore, the management style needs to be coercive and almost like 'bribery' to get them to work in the way required (Pettinger 2012: 332). Theory Y is the integration of the individual and organisational goals. The staff are interested in work and under the right



conditions they have the aim and motivation to achieve their potential and accept the discipline of the organisation (Pettinger 2012: 332). People, under the right conditions, learn to not only accept but seek responsibility (Pugh & Hickson 2007:155). These two almost polar ends of management approach would certainly have different results for an organisation long term. A Theory X approach would not survive long term and could have negative outcomes in terms of staff turnover and satisfaction. Theory Y focusses more on the behavioural aspects of a human relations approach and, therefore, would involve more investment into the staff and a greater and deeper level of satisfaction. Museum organisations would not function well under Theory X because of the nature of museum employment and the motivation that drives them. As previously discussed, people that want to work in museums, and in other non-profit organisations, are motivated not solely by money, but by job satisfaction and are keen to work in that environment. This does not mean that money and job security are not important, they are and this can be seen by the amount of museum staff that are members of employment unions and fight for better levels of pay within this area. Theory Y approach would be good for museum organisations as it would develop the individuals and create satisfaction through the role rather than just through increase in pay, which is rare in the museum sector. Theory Y is similar to my finding that museum projects need to align with the common mission and goals of the museum organisation in order to work most effectively. Theory Y takes this further internally in the organisation, and brings together the aims and goals of the individual with the organisation. Museum projects with a common-goal approach work much more effectively as a project and with the museum as an organisation.

### **3. Common-goal approach to projects in museums**

Just as the culture of a museum organisation influences the behaviour and its collective identity, the mission and role also plays a key part. Museum projects, in order to be successful, should also reflect the aims of the mission in order to create a common-goal approach, thus encouraging staff buy-in and ownership of the project. This is something that is also related to motivation and leadership, because it is the common ground that they both reach for when working as part of an organisation.

An organisation can be described in several different ways. It is an entity that most people will be able to understand but perhaps not be able to describe fully, partly because an organisation does not have to be physically in the same place, nor do all organisations look the same. We take them for granted because organisations are part of our daily lives (Daft 2004: 10). Organisations are made up of people and their relationships with one another which enable them to perform planned functions that contribute to attaining goals. Organisations are when people come together and realise what they can achieve when they work as a collective (Hatch & Cunliffe 2013: 90). They are also a place in which initiative and innovation can be harnessed and developed (Hannagan 2008: 271). An organisation cannot exist without interacting with its external environment (Daft 2004: 11) although how it does so depends on the organisation itself. Falk and Sheppard describe museums of the twenty-first century as 'learning' organisations, which can be interpreted as organisations that are responsive and adaptable (Falk & Sheppard 2006: 119). An organisation is a collective of people and functions, which brings together a common mission and goals. A museum organisation will have a main mission and will evolve and develop itself around this in order to maintain its role and mission as an organisation. It needs to be responsive to its audiences in and out of the museum, as well as adapting to influencing factors such as funding streams, audience needs, new methods of learning, reaching new audiences etc. An important point to keep in mind is that capital projects, as well as contributing to and developing the physical environment of a museum, can also bring about organisational change. That change can be in the structure, culture, or behaviour, and can move the organisation towards its new self. The risk is that this can have a negative effect, and this is where it needs to be properly managed with the museum's aims and objectives in mind, which can only come from those that have a knowledge of museum organisations.

Goals are essential to good working practice and enable individuals to work together in groups towards common goals (Hodge and Anthony 1988: 11). Organisational goals and strategies to reach them by managers is how organisation theory aims to make organisations more efficient. The goals specify the aims and the desired future state (Daft 2004: 74). However, goals can be made up into a hierarchy within an

organisation and the idea of 'goal setting' can also lead to conflict and compromise (Hodge and Anthony 1988: 287). Conflict can often be seen as a positive thing in that it focusses attention on particular areas that require resolution. As part of a planned project, this can be managed effectively and realigned. Examples of changes needed during a capital project and 'value engineering' as a result feature in Parsons's paper on the redevelopment of the Royal Albert Memorial Museum (RAMM) in Exeter (Parsons 2014). The relationship between the 'client' (museum) and the developers can often be very distant in terms of understanding the processes of decision-making in a project. Changes and revisions to original scope are often requested as necessary in order to keep a project on track in terms of cost and time, rather than keeping in mind the alignment of the mission. What the museum needs to ensure is that the quality of the end product remains high and fits the original aims of the project and goals for the museum. Parsons outlines the process of value engineering in a capital project and how this is not a common practice in a museum organisation. They are used to working on low budgets, but making decisions on cutting costs on large capital projects is different because even experienced museum managers will not have been through this process before. By using the results from the audience consultancy, among other documents that led to the development of the project, the cuts were made. But Parsons highlights that a 'major omission' was the retention of the mission and 'essence' of RAMM which existing and potential repeat visitors wanted to keep, as well as to 'reinvigorate', but not completely transform its identity and brand (Parsons 2014: 238). This links again to Griffin's point (Sandell & Janes 2007: 104) that museums need to retain their identity when approaching and going through change. In the interviews, Lees and Rayner (Imperial War Museum) felt that this was important to stay focussed on when adjusting the organisational structure to meet the realigned museum mission, along with the redevelopment of IWM London for the Centenary of the beginning of the First World War (opened in 2014). If they are strong on their identity and their mission, and their common goals, then capital projects will be effectively managed and led by the museum as an organisation, rather than the financial and time implications of the project environment. Working together on 'communal goals' means that there is a common purpose in a project (Weil 2002: 200).

#### **4. The role of the museum is fundamental to why many museums undergo capital projects.**

Museums are socially responsible organisations and, as such, involve creative leadership and focus. How a museum is organised is directly related to its relevance, competence and effectiveness (Janes 2013: xxii) and so its role throughout all types of change should be at the forefront of each organisational plan, as well as for museum projects, so that the museum continues to be relevant, as well as responsive, to the external environment and its stakeholders.

The role of the museum is discussed by Weil in 'Making Museums Matter' where he discusses how museums are building and moving on from collections and education focussed organisations, to being those that respond more, and are accountable, to the public (Weil 2002: 19). Although Weil does not specifically look at projects here, the change and refocussing of museums is relevant because it is often part of the reasoning for museums undergoing capital projects. Capital projects in museums give the organisation an opportunity to bring about a large amount of change, and visible change with a physical new building, for example. These physical changes can speak to the new ways of reaching out and providing for the public, in its broadest understanding. Each capital project I have had input into or researched into has highlighted the number of visitors and the aims to reach more and build on that, as well as reach new and different visitors. In order to do that, the offer of the museum needs to be new, different in order to grab their attention. The Ashmolean Museum Heritage Lottery Fund application included over 600 pages of evidence of their current audience reach and impact (quantitative and qualitative) and their intention to build on this with the new redevelopment. What is also interesting is that the number of objects on display was not increased significantly, yet the gallery space was doubled. If the success factor was to look at this only, it would be unfair, because the original aims of the project (Ashmolean 7) was to increase the engagement and connect with new and larger audiences through better interpretation and a completely physically accessible building. The coding of the interviews showed that Brown (Ashmolean Director) was very fixated on the provision for the public and accessibility of the displays, while keeping the academic integrity, because of the multiple role of the

museum as a public and University organisation. In the interviews, many of the museum senior staff also spoke of the need to refocus the museum's role and to have a better provision for the public, which is often a reason for a museum undergoing a capital project.

An organisation's core values outline its main aims and role, but can also be where there is complexity in its culture and potential conflict with its activity. For example, Boylan highlights Oxford as an example of University Museums that have very large public (not University student or researcher) audiences and suggests that this 'raises longer-term questions about the role and especially the funding of university museums which have such a prominent role' (Boylan 1999: 50). Even though this was over seventeen years ago, this is still a relevant question for today. A museum's core mission may include guardianship of collections for the nation, access and social purpose, but also be part of a larger organisation like a University. The same questions can be asked for the capital projects in these museums, because they use a significant amount of 'public' funds. They are now institutions for the public and it is one of the main aims of museums to serve their audiences and attract new ones. This links with Drucker speaking on the role of non-profit organisations and their benefit to society (Drucker 2006: 3) and Weil stating that museums have moved on from being '*about* something, to being *for* someone' (Weil 2002: 28). Drucker stated that "(t)he non profit organisation exists to bring about change in individuals and in society" (Drucker 2006: 3). Watson highlights how important the role of the museum can be in supporting the individual and collective memory, as well as the shared identities of communities (Watson 2007: 4 & 6). This role is not easily quantified and is something reciprocal between the museum as an organisation and its audiences. Therefore, when there are funding cuts to a museum organisation, implementing them can change not only the organisation's structure, in some ways it can also change its role and ability to fulfil its mission. With major funding streams coming to an end for some museums, and the amount of philanthropic support harder to find, museums have to make these tough decisions, as these funding sources continue to decrease (Janes 2013: 18). It is also through crisis that opportunities can be found, and a refreshed assessment of the organisation's structure and ability to react and generate new funding opportunities

can then be explored. In what Alberch describes as a 'crisis of identity' in museums, he raises the concern that museums are diluting their research objectives as a result in the change in their environmental influences and that museums are in fact well-placed to carry out multi-disciplinary research due to their collections focus (Knell 2007: 365). This highlights the role of the museum, but also the parameters between which it should change itself in response to external influences such as funding streams and cuts. In some cases, museum staff broaden their responsibilities to include all aspects of our heritage (Kavanagh 1994: 37). As Weil states, the museum is being asked to earn and justify its keep (Weil 2002: 40).

Museums are part of the non-profit organisation community and their approach to evaluating their performance against their role does not focus solely on the financial side, but also against the criteria in their role as per their mission. Project management and projects can provide opportunities to create and measure change to better reach these goals in their mission. Non-profits can often be places where it is considered 'inappropriate' to talk about profit or working in a more commercially or business-like way, although there are examples of museums working in this way (MacDonald 2010: 401). But non-profit organisations need to be financially responsible to their stakeholders and give value for money, however 'unpalatable as some may find the thought, money does matter' (Weil 2002: 13). Non-profit should not mean that the organisation runs at a loss financially and being able to cover the expenditure is essential for any type of organisation, be it a 'cub scout' group or 'global corporation' (Drucker 2005: 3). It is not enough for an organisation to say how they serve a need and are exempt from commercial practices and benchmarks, and they not only have to work in more creative ways to ensure that they are financially secure, but they also need to balance and meet the needs of their remit as a museum organisation. This is because the 'museum's goal is to meet the mission, rather than make a profit' (Walhimer 2015: 104). There can be a conflict of cultures when the issue of funding and sustainability is brought into a museum organisation, and the changes to the structure to bring in more funds can be seen as in competition with and a 'dilution' of the role and purpose of a museum (Weil 2002: 13). In order for museums to operate efficiently as non-profit organisations, it is essential that they

recognise that there is a place for an appropriate business-like behaviour and culture in a museum, particularly when carrying out capital projects, as collectively the organisation is answerable to its public in content, operation and efficiency (Weil 2002: 19).

Non-profits often have a wide variety of audiences and stakeholders, making performance measurement and management difficult (Drucker 2005: 109). For museums, the responsiveness to the stakeholders is essential to keep the museum relevant to its public. Capital projects aim to create major change which is physical, but the effect is that the organisation itself is changed and the internal culture needs to adapt. This organisational change will evolve if it is not designed and led through leadership throughout the organisation and communicated effectively and clearly. The 'unashamedly managerialist approach' in public museums is considered necessary in order to accommodate both the element of public service and political accountability, which is different in essence to the market notion of accountability to the 'customer' in a business context (Moore 1994: 170). Janes goes as far to say that 'business literacy' is essential for museums to remain sustainable in a world with limited resources, and also important for accountability as an organisation too (Janes 2009: 118). Pachter states in his foreword to Weil's book:

"The 'romantic' age of the untouchable, unaccountable, unchallengable, perhaps even ineffable museum is over. The world is asking tough questions of us, questions we need to answer. We are accountable to our publics. But we must shape the terms of that accountability by clearly articulating the institutional ends by which we ask itself what it is for, and more than that ask itself how to determine its own success or failure." (Weil 2002: Xiii)

Non-profits need to answer to their stakeholders, adapt their ways to their audiences, but clearly state and define within what parameters that can be done. Projects in museums are important mechanisms for change, but then it is important that the museum is clear on why and how it is carrying it out. Museums are man-made and can articulate our best understanding or certain subjects. As Sandell highlights, they can also be spaces for further expression and activism (Sandell & Nightingale 2013: 46).

What is clear is that projects are able to create substantial physical change in a museum, but it is the organisational culture and subsequent behaviour of the staff in it that will determine the future relevance, reach and impact of it.

Over the hundreds of years that museums have been in existence as organisations, the audiences and the role of museums have evolved and developed. What museums have focussed on as they have developed is keeping themselves relevant and engaging to their audiences, which Black describes as external pressures to become 'people-centred' rather than 'product-led' (Black 2005: 77). Engaging in major projects is often the most significant physical change that museums go through. What is clear is that the process should also include consideration of the organisation culture and structure in that change. Marketing for museums does not refer to just advertising etc.; it actually means that the museum is listening and changing to appeal to and reach their audiences and fulfil their missions, also meaning that they can not only 'survive' but 'thrive' (Sandell and Janes 2007: 18). Museums need to attract broader audiences and they have become places that have changed from very academic places, to venues that also combine education and are part of leisure time (MacDonald 2010: 336), although this may not always sit comfortably with the museum organisation itself (Fopp 2001: 4). Museums need to be responsive, both to the communities they serve and the external forces in the environment (Janes 2013: 172). Since museums have come into existence, their role has developed and expanded so that their role is no longer purely keepers of collections and internally focussed as described by Griffin (Sandell & Janes 2007: 105), but also increased change in roles to include communicators, entertainers, educators and places for social change (Janes 2009: 95). It is therefore understandable that adding management training to an already long list of skills has met with some resistance (Fopp 2001: 4). With museums being responsive to internal and external aspects of their role, capital projects have become ways, even opportunities, to create rapid physical change in order to increase certain aspects of their role as an organisation. Physical refurbishments enable expansions of audience type and reach, as well as impact, which is growing in importance with reference to research excellence measurement. It is also relevant internally, where collections and teams need appropriate spaces to work. Along with this, the organisation structure



and culture should also be considered and designed, rather than being adapted and waiting for it to settle, which can sometimes be the case of capital projects. The collective mission and role of the museum needs to be kept in mind and reflect the needs of the various stakeholders both in and outside the museum during capital projects.

### **5. Museums need flexible-frameworks to ensure that projects incorporate and consider the culture and behaviour of the museum organisation.**

The culture of an organisation can be seen to have three particular layers: values, beliefs and assumptions. Fundamentally what a structure needs to do for an organisation is create the most appropriate environment for the functions and performance. Consideration needs to be made for the operational, cultural and behavioural barriers in that environment and changing cultures and structures can only be done by addressing the values, beliefs and attitudes, as well as the technological and operational factors (Pettinger 2012: 45). It is also important to look at the internal environment and ensure that the organisation has the willingness to respond to change (Pettinger 2012: 20). Weil highlights that the 'easing of the disciplinary boundaries' is not as radical as it could be, since the division of disciplines has varied over the centuries since museums were created, like the original collections that formed the Ashmolean Museum (Weil 2002: 42). Therefore, we should not think that there is ever only one way for a museum organisation to be. With the changing culture and shape of a museum organisation, the project creates a flexible-framework. Recognising the shape and internal formal and informal cultures of the museum is necessary in museum project management. As the project develops, so do the needs for the project processes and the organisation. The project management style can be based on the understanding of the patterns of behaviour that underpin the museum and its activities by analysing an organisation's culture and looking at the past behaviour and what could be considered 'traditions', the nature their activities, what they consider to be their mission, their size, as well as the leadership and management styles (Pettinger 2012: 106).

Concepts can inform practice and develop a good management approach (Lord & Dexter Lord 2014: 4). Museum project management needs to be relevant to the type of museum and its mission. Museums often, if not always, have a mission statement and it is an important part of a strategic plan and guide of the organisation's principles and reasons for making particular decisions. It is essential that when considering the future of organisations, that questions culture, structural change and development are addressed as part of any staff strategy. They should also be related to organisation policy, priority, direction and performance (Pettinger 2012:413). Identifying what type of culture a museum has may be an effective way of assessing how well they react and develop as an organisation during periods of change, and this is something that is brought into my case studies and data collection.

It is important to allow people to be creative within a controlled framework, which is why I describe Museum Project Management as a flexible-framework. Creativity is not the sole purpose of managers and supervisors, as their role is to get everyone to work to their maximum potential in a productive setting. Purely controlling people does not work long term. Creative environments sit well in short, fat organisational structures. There is still the needed hierarchy and structure in an organisation, but there is also the space for groups to be creative and develop their key areas of expertise, while still all reporting and being part of the central senior management. Tall organisations have many levels and nodes of control, and are good for complex tasks, but for museums, the autonomy and creativity is needed to ensure that museums develop, as well as having a mechanism to listen and respond both internally and to external audiences. An organisation's culture is the most important overriding variable of all, the most difficult to measure and very hard to change, which is certainly the case in museums. It can be done, but the process needs to understand that people with purpose make projects happen.

Management is an essential part of an organisation and so needs to be considered when researching organisations. McCall and Gray explore the theory and practice of 'new museology' and organisational change, which also includes the 'widening of roles and expectations' for museum staff in the UK (McCall & Gray 2014: 19). In terms of

organisation and management, it is difficult for policy implementation, because of the wider and broader roles of the museum staff, and the ability for those to be interpreted in different ways (McCall & Gray 2014: 31). Therefore, the management of the organisation is more difficult than other organisations because of the change in shape of the structure and roles within it. In terms of project management, this may not have been considered as much because of the temporary nature of projects. However, from my experience, the literature that refers to change and general management of museums is also relevant to museum project management, although it is not explicitly written.

Management theories have been important since the industrial revolution, where systematic approaches to management were developed following the increased use of new technology and machinery, as well as increased size of organisations, wider reach in terms of distribution and new, sometimes global, environments to work in (Pettinger 2012: 42). Project management approaches are as important because they need to work with the museum organisation, and bring about change. However, if museums do not adapt and incorporate more management and appropriate project management approaches within their organisations, they are at risk of inefficiency, which could lead to becoming not financially viable (Weil 2002: 19). The balance between working in a business manner and the organisation's mission is an important consideration for museums, as shown by the following being written into the role description for the advertisement to recruit a new Director of Public Engagement for the Natural History Museum in London:

“They will be able to demonstrate an understanding of the balance between organisational public purpose and commercial viability, and a tangible passion for the mission of the NHM and its ambitions.”

(NHM 1)

Griffin refers to the business approaches from commercial companies, and states that museums should recognise which elements they should take on, as well being faithful to their own institutional mission (Griffin & Abraham 2000: 335). Ryan looks at Australian museums in the ‘age of risk’ and how the role of museums has evolved as

socio-cultural institutions that perform a variety of roles and functions, and are 'under pressure to change in the wider public sphere' (Ryan 2017: 372). The same can be said for UK museums as they learn how, and how much, to adjust to their external environmental pressures, while remaining true to their mission or adapting appropriately for their audiences and themselves.

## **Conclusion**

What is clear from this chapter is that organisations take different shapes depending on their role, and 'boundary objects' (Bergman 2007: 546) need to be designed in order to bridge the different environments and ecologies that exist in museums and project management. This way, they can speak a common language and focus on common tasks and ultimate goals. Projects within museums organisations need to be goal led. In order to be a successful project for the museum, the project goals need to fit the organisation's mission goals. Creating a flexible-framework to manage a project will enable it to be a common-goal orientated project. Within a museum, this is more likely to gain traction and be owned and taken forward by the staff, and, therefore, be more successful for all stakeholders involved both in and outside the museum, using projects as boundary objects. People with purpose make projects happen.

By exploring the theories of organisation and leadership and how former and current theories are applicable to, and in certain circumstances have affected, the management of museums, this review provided my thesis with a firm underpinning of management theory models from which I was then be able to select the ones most useful to my research. Reviewing the literature that relates to these areas enabled me to look at key definitions and have an overview of the research in these areas to date. Following this review, questions to investigate related to museum projects include the differences and similarities between profit and non-profit organisations and how the theoretical and practical approaches are carried out within both. The challenge for all managers is to balance the need for uniformity with the demands for diversity. Uniformity makes it easier to control and supervise, as well as integrating work from several subgroups or teams and makes for economy since it is easier to pay for and maintain one system rather than many. Managing this can be done through internal

grouping options (Daft 2004: 97). Museums overall have a certain amount of uniformity with similar needs across them all, such as collections management, public engagement etc. However, with different types of museums, there are different approaches and structures that work most effectively in each different situation. Should non-profit, more specifically museum, organisations be treated differently? Given the continual changes in the environment in which museums operate, what theoretical approaches are the most appropriate, if any, and what approaches have not been applied already within a museum organisation which could work effectively? The environment in which the organisation is based is constantly changing making it unpredictable and it must then manage responses to these changes, such as rethinking their approach. The theories of organisation, and the history of their development, have shown that the environment and open systems of organisations need an almost bespoke approach for each situation. However, there is a limit as to how much an organisation can adapt itself each time it is needed and, therefore, a structure and staff that are able to work within flexible parameters would be the best situation. Does the history of how organisation theory developed affect how and whether it is used and accepted in practice today? Museums have developed since their days of cabinets of curiosity and, within themselves, used various different structures in order to accommodate the needs to their institution. With museums also being open-systems, they are greatly affected by the environment in which they exist and, therefore, need to accommodate and learn to work with it in order to work as optimally as possible. Leadership is clearly an important aspect of a museum organisation in order to enable the motivation and satisfaction of the staff, as well as the overall performance of the organisation.

By looking at the key definitions and reviewing the literature to date, the relevance and links have been explored of organisational theory to non-profit organisations and museums specifically. In the next chapter, the literature analysis will include project management literature in addition to organisational culture, structure and behaviour related sources. By deepening the analysis into this area, the intention is to understand if there is also a gap in the literature with reference to museum project

management theory and practice, and understanding what is missing and what could be possible going forward for future museum projects.

## **Chapter 5**

### **Museums and their Environments: structures and response**

#### **Introduction**

In the last chapter, I looked at the formal and informal cultures of the internal museum organisation, and how this affects reception and behaviour of museums when undergoing change through capital projects and project management. With the last chapter looking at the internal aspects of the museum as an organisation, here in this chapter, I will outline and explore how museums operate and exist in their external environments. More specifically, I will look at how museums, as organisations, react to changes through their organisational structure. What is clear from the literature review, and my experience in museums and fieldwork, is that the organisational structure in museums can sometimes be designed, evolve, develop, or be forced to react to changes in its environment. Capital projects and project management fit into this discussion as they are often the vehicles for change, or designed change, albeit some changes will be unintentional to the organisation. As outlined in the last chapter, I have shown that projects can act as boundary objects that enable the museum to benefit from the expertise of external staff with different skill sets and move the museum into a different state. The following chapter will look more into the factors that affect museums and contribute to their decision to take on major capital projects. Looking into the structures of organisations, their cultures and behaviours, leads to an understanding of their choice of project management processes and how they as an organisation react as a result of change. Any change is never easy, and the needs of the museum as an organisation, and the consideration of its culture, should always be kept in mind when creating and leading projects. Ultimately, people with common purpose make successful projects happen.

Organisation structure is where theory and practice come together. The management decisions and design of the organisation structure play a major part that determines how the organisation will work and its success. It is also essential in order to determine the strategic goals and the strategy to reach them (Hodge and Anthony

1988: 240). Therefore, organisations all have a common goal that they work towards by pooling the talent and capabilities of individuals. Mission statements for organisations are often created to establish, remind and maintain the overall goals (Hodge and Anthony 1988: 255), a practice which is commonly seen in the museum sector. As discussed in the last chapter, a common-goal approach to project management that links with the mission statement is important for a project to work within a museum.

Organisation structure, culture and behaviour have been the subject of extensive published research over the last few decades (Handy 1999, Crowther & Green 2004, Jones & Munro 2005, Drucker 2006-2007, Pugh 2008, Hatch & Cunliffe 2013), which focusses on a broad range of organisation types, but not hugely on museums as organisations. Exploring the organisational structure of museums and their environment is necessary in order to comprehend project management in museums. Organisational theories mostly focus on the business and corporation type of organisations, with some literature exploring the non-profit and volunteer sector (Drucker 2006). The language of organisation theory and management is from engineering environments (Hatch & Cunliffe 2013: 20), but things have changed a great deal and the language with it: organisational culture and shared values, networks, alliances, power and influence, leadership rather than management. Organisations are societies and communities, rather than machines, and this speaks to museums a lot in terms of their role, as discussed in the last chapter. The mission of the museum guides its role in its environment and also guides its behaviour. As the voluntary world has always known, organisations are living communities with a common purpose (Handy 1990: 21). What are the common features in the way different organisations function? Many answers to these questions can be found by looking into the structures of organisations, their cultures and behaviours, which will also lead to an understanding of their choice of project management processes and how they as an organisation react as a result of change. It can also help identify if the organisation is fit for purpose, how resilient it can be during periods of change and reacting to the impact of its external environment. An organisation's structure sounds like architecture, and is indeed similar to that. The word 'structure' itself can suggest



something that is set and inflexible and is something that can be referred back to when there is unwanted change. But what is clear is that throughout its lifetime there will continually be some form of change affecting an organisation, and it is part of the organisation's culture which will determine its behaviour and reaction to change within the confines of its structure and external environment. Museums need to support their audiences and stakeholders to reach their 'communal goals' (Weil 2002: 200).

### **Museums and their Environment**

The reaction of museums as organisations to the changes that come from their environment can determine their survival and also their role in that environment. Through the literature and fieldwork, something that is important to identify is how organisations come to the structure they have, and if that is designed and/or evolved. The structure can incubate and feed the culture, and so go hand in hand. It is the structure that is often first visible to the external environment when the organisation responds. Museums are affected by their environment, which means that they are in open systems. Therefore, they rely and react on the financial, social, and political changes in that environment. Drucker believed that the structure of management was speedily moving towards a unified discipline of organisations that are both practically and theoretically sound (Drucker 2007b: 167). But how can this be the case when some institutions are still struggling and working inefficiently? In Vergo's 'New Museology', the same issue is discussed in 1989. We have had significant financial downturns since then, most recently in 2008-9. Because museums are in open systems, they will be in constant areas of change. Through reinventing themselves structurally, some have managed to survive, continue to serve their audiences, and attract funding. This has been done in various ways and I am interested in seeing if it is the change in structure and culture of the institution that enables this after the changes begin affecting the institution, or whether the museum changes its structure in order to prepare itself and make itself as efficient as possible for when the changes come along. In my fieldwork, I explored the ways in which museums are organised and how project management works within them. For example, the Ashmolean used a combination of internal collections and museum studies expertise, and added project

management consultants from external companies. Whereas the Victoria and Albert Museum did initially do the same for FuturePlan, but then Mark Jones (V&A Director 2001-2011) brought much of the museum project management staff in-house and created a projects department. Bringing in expertise in-house is one way that museums cope as organisations with the changes in the environment and the uncertainty of it. This is also often seen with commercialisation in museum organisations, with commercial departments being created to cope with these new aspects to the organisation and need for more resilience for what is commonly a non-profit organisation in their type and role.

### **Ripple Effect of Capital Projects in Museums**

For museums within wider organisations, such as university or local authority museums, they are contained, and sometimes restrained, by the overall function of the organisation, but also to some extent protected by it, showing that it can be both a blessing and a curse. In some ways, the structure and culture change of a museum in this situation is limited because of the overarching organisation. However, my view when working in the Ashmolean was that the structure has evolved over the hundreds of years it has been in existence. Therefore, the major redevelopment project, completed in 2009, created a huge amount of physical change to the galleries, offices, education and conservation facilities, and even created a roof-top restaurant. What the physical changes also led to were approaches to projects and project management, a culture of 'getting back to normal' in some departments, or a non-engagement approach from some of the services departments, which meant that external contractors were used to fill their role. Understanding the structure and culture of a museum and their skillsets that could go towards a major redevelopment is important at the planning stage of a project.

“Organisational structure and culture often remain unexamined as key elements of institutional change and long-term viability. It is time that these critical elements of museum operations move up the priority list for examination and adjustment in order to build more resilient institutions that work and thrive in the 21<sup>st</sup> century” (Janes 2013: 192)

Without the right type of organisational structure and culture, it means that great ideas only breed frustration (Handy 1990) and there is no 'correct' singular type of structure. Fopp said that it is important that the organisation and museum framework learns how to cope with the changing external environment (Fopp 2001: 177). It is clear that museums have to read and respond to their environment in order to understand their role and how to operate, but within the boundaries of their abilities as a non-profit organisation and still being true to their mission as a museum. Janes highlighted that the organisational structure and culture were often unexamined key elements of institutional change and that it is important for this examination to be done in order to create resilient organisations (Janes 2013: 178). Any change needs to be planned, and organisational change to the structure, will automatically affect the culture. In order for museums to be fit for purpose, relevant, and serve their audiences, they need to make changes. When this is done through capital projects, the change is often visible in a new building or gallery. However, this change often ripples throughout the organisation and can go relatively unnoticed at particular levels of the organisation. This was shown in the leadership interviews I carried out for this research, and is more apparent in museums where there are clearer departmental lines and divisions. The external pressures on museums have increased in the last ten years (Janes 2013: 192) which means a lot of change to museums may feel imposed rather than organically developed.

When considering organisational theory, there is the question as to how the structure and culture of an organisation affects and contributes to its behaviour during times of change. The developments in this area have considered how to get the best out of the employees and progress the organisation in line with its aims and objectives, while at the same time reacting and dealing with the wide range of external factors, therefore maintaining its resilience.

“The learning of techniques to help cope with the changing environment and culture of the museum framework is fundamental to the successful future of our museums” (Fopp 2001: 5)

Museums have had to encounter and react to the increased awareness and need for management and an organisational structure which can enable them to react appropriately. Without the right type of organisation structure and culture, it means that great ideas will only breed great frustration (Handy 1990: 19) which can be a major issue when bringing the organisation together to carry out projects. When investigating these areas, it is essential to understand how operating in an open system affects them. Museums are both reliant on and should be responsive to their environments to a certain extent, and systems theories identify how these reactions and interactions come about.

### **Systems Theories: museums reflect and respond to their environments**

Museums are in 'open systems' but they need to be able to react to change, respond and continue to operate effectively and responsibly to their environments. As shown in previous chapters, the role of the museum is seen as an organization that is non-profit and for societal good, rather than a place for commercial operation. As discussed already, what is becoming clear is that museums are having to increasingly bridge the gaps in their funding and address questions about their role and response to the public. As organisations, museums were not originally designed to be income generators, but this is where they have had to adapt and change their operation. The mission and core aims for museums as a whole was to be for public good. Neil MacGregor said that a museum is like an 'open university' and a 'public square' which is why research in a museum is so important (TORCH 2016). Some museums will not be able to start generating their own income quickly enough, and with the significant closures already reported by the Museums Association since 2010, there may well be more to come over the next years (MA 2017). These are examples of where museums are in open systems and directly affected by changes in the political and financial landscape, but also an opportunity to review and identify the role and mission of museums and how they can develop in a resilient and sustainable way.

Understanding that museums, as organisations, exist in this way from a systems point of view is important in order to plan and shape their organisation to be fit for purpose. Museums are complex organisations and no two are the same (Latham & Simmons

2014: 39) and, like many organisations, they operate in open, rather than closed, systems. Organisations can be in open or closed systems, where they either interact with and are affected by the external environment, or they are closed to it. Museums are in open systems as they need and have to interact with their external environment, and systems theory means that there is a feedback loop (Latham & Simmons 2014: 40). Complexity theory in project management means accepting that projects are within an open system and are affected by many external factors that cannot always be completely controlled or predicted. The project manager has the ability to increase the team's effectiveness with both flexibility and recognition of individual capabilities that can drive the project forward (Curlee & Gordon 2011: 9) and this flexible approach and understanding that no two projects will be the same is important in a museum. Systems theory outlines that systems 'self-regulate' through a series of feedback loops to realign (Latham & Simmons 2014: 40), which is similar to the common-goal project approach that I described in the last chapter. This aims to ensure that the project is developed and understood by the stakeholders involved, but is not always enforced in project processes in museums. As a project manager, I have had to deal many changes during projects, including companies meant to supply goods going bankrupt, negative press coverage, loss of skilled staff, and even world financial collapse and consequential loss of funding and funders which meant I had to deliver projects on lower budgets. When a fresh and eager approach is needed, project teams can often provide the new ideas and alternative options in order to reach the same original goals, but perhaps in different ways than originally planned. Based on the projects I have been involved in, it is clear that having a broader project management understanding and foundation, as well as a connection with the museum organisation is essential when making these decisions and recommendations. The changes brought from being in an open system can sometimes be predicted and mitigated to a certain extent. This is often seen in short-term staff contracts, to lower the risk of financial commitments for the museum, or capital projects when a fresh and new entity is needed to serve their audiences. Within all of this, communication within and outside of the museum's role and mission, particularly during a project, is key.

Focussing on communications, the systems approach means managers focus on the role that each part of the organisation has and the role it plays in the whole organisation rather than looking at them separately. By doing this, the differing needs can be taken into consideration in order to work out how to bridge the barriers between them. The project management approach within a museum organisation then needs to keep in mind the synergy, interrelationships and areas in which parts of an organisation can work together in order to enable increased efficiency. In addition, they need to also keep in mind the open system, boundaries, and feedback loop within the organisation (Hannagan 2008: 12). Managers in all areas of the organisation need to be aware of and react to the needs overall in order for the organisation to work most efficiently overall. The level of dependency on the external environment varies greatly, depending on the input and outputs of the organisation and how dependent the system is. Museum organisations rely greatly on their external environment, as this includes the culture of their existence, funding, acceptance and engagement of the 'museum product' by the public and marketing (McLean 1997: 105). Without audiences and the variable situation that comes with them, museums would not exist, but they have needs and museum capital projects need to be acutely aware of this in their planning and delivery, and keep the feedback loop system in place during and after completion in their operation.

How museums operate as an open system is very important, as organisations need to be flexible in particular ways in order to accommodate the flexing in the environment and work most effectively. An organisation that cannot adapt and work in this way could miss out on opportunities to work more effectively. Specifically with project management, trained project managers from different environments, such as construction, are often brought in to work on museum projects with the existing staff. The tensions that can come about by what is effectively change management but in a temporary project situation may be seen as something that museum staff need to endure rather than work with, which has often been my experience. If an organisation is already used to working as an open system and listening and responding in a positive and effective way to its environment, then projects that are carried out by them may be more readily accepted and worked through by the existing staff. Project

management techniques and approaches can play a very important part in this situation by being an inclusive process rather than an exclusionary one. One of the most common qualifications and processes is PRINCE2 (PRojects IN Controlled Environments), which is widely used in UK government and also in the private sector as well as internationally. Originally developed for government information and communication systems projects, PRINCE2 works on the principle that everyone involved on the project is trained at least up to the Foundation level. This is to ensure that everyone understands the principles and processes. However, it is very rare that all museum staff will be trained up to this level and so PRINCE2 cannot be applied in its full intended extent. Although PRINCE2 can be adapted for many situations, museums often do not have sufficient resources, or perhaps autonomy across all areas, to implement established management techniques. The issue of taking the institution with you is a major consideration for the staff involved, many of whom will have strong views of their environment and the manner in which they have worked and operated up until the initiation of a project. Watson's 'Museums and their Communities' talks about taking the Institution and its staff with the project. This is critical if the project outcomes are to be sustainable. The papers in this book (Watson 2007) discuss the changing role of the museums, control and the challenges facing the museum and communities in the 21<sup>st</sup> century.

“...isn't that what is troubling museums? A loss of authority over our own field of expertise?” (Watson 2007: 515)

This foregrounds the tensions that arise within museums that undertake projects, and between museum professionals, their audiences, and project management professionals who claim they know best. Museum professionals frequently feel that their credibility is undermined by a range of pressures that arise within the development and implementation of projects. 'The museum's role has been transformed from one of mastery to one of service' (Weil 2002: 196). The organisation approach and culture is essential in order to deal with these feelings and make sure that projects are taken on wholly and owned by all stakeholders. Without this, the project may not achieve all of its goals and the organisation return to the previous

state, rather than embracing and carrying forward the change. Learning how to understand and make sense of the external interactions of being in an open system, and translating that internally, is essential for museums as organisations, particularly when going through projects.

### **Roles in Museums: the evolving museum professional**

Capital projects change the physical aspects of a museum, and then what follows from that can involve larger audiences, larger profile, and more diverse audiences with different needs. What is clear from the Ashmolean example is that the Education Department and offer was hugely important in the Heritage Lottery Fund (HLF) funding application and then more so afterwards as the aim for the redevelopment was to increase the number of visitors (quantitative) and also the types of audiences (qualitative) (Ashmolean 4). However, the structure of the museum remained the same from the perspective of the curatorial departments, and the Education Department (Appendix 6-12). The increased workload on the Education Department was managed well by the team and they hit and exceeded their targets. However, the feeling of going back to normal after the project was felt most in the curatorial departments after the project was complete, including some of the short-term curatorial roles for the project coming to an end. The common mission of the museum and its connection with its environment was not as clear, and although the Education Department did an excellent job, the role of the museum within the University (the overall organisation that looks after the museum) came into question. Here it was clear that the relevance of the roles in the museum, its structure and internal interactions, and consequently its connection and relevance to the external environment are all interlinked and need to all be considered and accommodated when planning capital projects in museums.

### **Internal Relationships**

Overarching organisations and relationships within the organisation itself vary depending on the type of museum, as shown in the fieldwork through the responses in the interviews. For example, the Museum of Oxford were more focussed on the project, rather than staff, whereas there was more focus on the Staff theme in the



other National Museum related interviews. A good way of assessing and exploring an organisation's structure is to look at the relationships within it. Quite often, this is expressed through a chart, but there are also important informal relationships that exist and contribute to the overall activity. The organisational structure is a map of the organisation's linking relationships (Fopp 2001: 149) and shows the flow and exchange of interaction in addition to the hierarchy. 'Hierarchy-bashing' can be seen as a popular thing to do within an organisation and often a scapegoat for underlying issues of communications and unclear visibility throughout an organisation. This can be linked to a resistance to change, an insecurity of where the organisation is moving to and where those individuals feature in it, and also again, as shown in the interviews, a disconnect between the senior staff and the rest. Communication internally is essential here, and it is a necessary and an essential part of good leadership. In the interviews, there were no references to how the organisations responded internally once the project was completed, and there were no responses that included 'getting back to normal' at the senior level. There was more of a focus on the new museum and moving forward. This shows that there can be a disconnect between the leadership perspective and viewpoint compared with the rest of the staff. An organisation's culture can be broadened and communications issues dealt with effectively if clear routes horizontally and vertically are known and used appropriately (Henry 2001: 114), which is important to address before, during, and particularly afterwards in a common-goal approach to museum project management.

Organic systems take into consideration the needs and opinions of the staff which ultimately has group leadership and exists independently. This type of organisation relies more on the personalities of the staff, rather than hierarchy. Mechanistic organisations have a clear hierarchy with specialised roles and can be seen as bureaucratic. This type of organisation structure finds it difficult to react in times of change because of the levels of bureaucracy. Daft emphasises the point that the organisation cannot and should not be 'protected' from the unpredictable environment, nor should managers expect their organisation to remain ordered and attain rationality all of the time. A balance between order and flexibility should be the target in this situation (Daft 2004: 6). For museums, undertaking a capital project is an

opportunity to bring about change in a planned and controlled way, although commonly in the examples explored in this thesis, the organisation structure before, during, and afterwards is not always taken into consideration. Organisation structures have to live with the contrast of diversity and uniformity. Their environment will never stay the same and so for an organisation to survive, it needs to be able to evolve in order to cope. One way is that divisions are created in order to deal with diversity and different needs (Handy 1990: 106), while using organisational models to ensure that compartmentalising does not occur in operations (Lord & Dexter Lord 2009: 30). As museums have to become more accustomed to the different modes of operation and their environment, they focus on who the 'customers' are and consider the appropriate marketing and targeted approach for them. By creating targets and measuring performance through visitor numbers, for example, museums are already beginning to develop in a more business-like manner. 'Tomorrow's museums cannot be operated with yesterday's skills' (Weil 2002: 46). Managers in the future cannot and should not expect their jobs to be static, as the changing approach and processes in that organisation require the managers to react and work differently depending on the given situation and best approach (Hannagan 2008: 82). Careers and 'a job for life' were something expected in previous decades and there is now more of a loyalty to the work, rather than to the employer (Handy 1992: 68). This can also be seen in museums, as there is a greater focus on roles with the titles of 'marketing', 'human relations' and 'public engagement'. This refocus on the roles within a museum organisation has been heavily influenced by the environment that has changed over the last decades. There has been a considerable decline in public funding and a need for funding bodies who are now ensuring that there is more accountability and reporting, which includes the adoption of appropriate management processes and methodologies.

### **'But we are non-profit': the idea of longevity**

Museums, as organisations, have been in existence for a long period of time and, therefore, have a history and association of longevity. With the rapid development of management practice in the business world, museums have been seen to remain more

stable and not as a place for rapid change or quick reaction to their surroundings. Can and should Museums change their organisation structure in order to fit in with their surroundings, or should they carry on as they have done and continue to survive? 'With most of its ideological foundations rotted away, that structure can no longer function in all the ways its builders intended' (Weil 2002: 196). We have already seen that in order for museums to survive, they need to change certain aspects of the structure of their organisation. But with external environments changing frequently and rapidly, museums should take note of what influences to follow. The environment around them affects how they continue and become more relevant to their audiences. They need to be accountable to their stakeholders, who are wide ranging and include their funders, their visitors, as well as the board etc.. In order to develop and change into something that is relevant and flexible, the structure needs to be set up to do this. It is the ethical duty (to the staff, stakeholders and communities) of an organisation to survive (Pettinger 2012: 69). It is the role of management and organisational change to nurture museums and continue to be socially responsible organisations (Janes 2013: XXI).

Many of the issues with museums and galleries can be considered to be a result of poor structure (Fopp 2001: 135). Since this was written, many museums have undergone major capital projects and changed significantly as organisations. Many museums have had their structures set at an early stage of development back in history and their earlier existence. This will be explored with the case studies material where museum organisational structures have changed over time and what influenced that. The factors that lead to the decisions of what is the most appropriate structure for a museum are different now and should be reviewed. In order for any organisation to create a structure it wants, it needs to go through a significant period of change. This is itself is a major series of events. If done well, the organisation can come out stronger. However, if done in haste and without taking the museums staff with the changes, this process – even if the new structure is indeed in place afterwards – can leave the organisation weaker. We need to consider what is needed and how we can build it. Structure is dependent on what the business is and what it should be (Drucker 2007b: 168). By carrying out an activities analysis and looking deeper at what is

needed within those activities, the end results often show that what was historically meaningful, as groupings and activities, is no longer the case, nor does it make sense. They can instead become obstacles to better performance and efficient use of resources (Drucker 2007b: 170). The Ashmolean Museum underwent significant physical changes with all of the extensions of the building being demolished and a new extension added to the original Cockerell building, which was completed in 2009. The organisation itself was adapted and added to, rather than being changed through an overall design. In my opinion, the reason was that this was a comparatively new venture at the time. This had only been done previously on this scale in National Museums, which have larger staff numbers and departments. Another reason was the focus of the senior management on the audiences, including the visitors and the academic researchers from universities who use the collections. However, the resulting adapted changes meant that there were clear divisions between some departments, and gaps filled in others, and specific new posts including 'Commercial' and 'Museum Services'. None of the roles between the original curatorial departments were shared or adapted in anyway. In the decade before the project, each of the conservators, who were based in separate curatorial departments, were brought together in one new Department 'Conservation'. This made sense from a physical perspective, as all the necessary equipment and extraction etc. could be put in one place. However, from my interviews I know that the senior management believed that it would have been much change in addition to the 35 new galleries for the museum as an organisation. 'The process of change is open-ended, participatory and tough' (Janes 2013: XVI). With museum resources so limited and becoming increasingly competitive, museum organisations need to recognise and understand their mission, role, goals and the structure needed to move forward. The risk otherwise is for internal fighting and empire building, rather than cross-disciplinary collaboration.

### **Evolving or Designed Organisational Structures**

The structure describes the relationship between different parts of the organisation and people within in, as well as taking into consideration the objectives, resources and the environment (Hannagan 2008: 274). An organisation structure should create a framework which outlines the hierarchy, reporting relationships and group

responsibilities, as well as how the structure links together as a whole (Daft 2004: 120). There are several types of organisational structure that are outlined by Drucker in particular including Functional, Federal, Divisional and Matrix. The two structural principles that Drucker believes an organisation should use either or both of are 'functional' or 'federal' (Drucker 2007a: 56-57). This view of how structures can work is actually an interesting starting point to assess how museums currently have their structures. The two types of structure, functional and federal decentralisation, are described using 'business' terminology, but their principles can be interpreted and applied to non-profit organisations as well. Most commonly, organisation structures focus on the vertical linkages including hierarchy, whereas many organisations need more than this in order to continue to be efficient. This is certainly true of my experience and research into museums that go through capital projects. Hierarchy is needed and, when used well, can make an organisation more efficient and have a culture of collaboration and unity. However, when a capital project is carried out, this balance is disturbed and new reporting lines are created and connections made for the project. A contemporary learning organisation emphasises the horizontal linkages of cross-group communication and coordination as well as the vertical linkage of hierarchy (Daft 2004: 121), which would enable a project structure to map onto a museum organisation and work in a more agile way. Agility in museums has been addressed by the Agile Museum Conference in 2015 (AM 2015), and including this language in a project sense brings an understanding of the need for flexibility, but also boundaries to operate within.

A functional structure is considered a good model for small to medium sized organisations, but can create issues when they grow into larger ones (Hannagan 2008: 276). This type of structure uses the principle of specialisation based on function or role. A functional structure is one which sets up integrated units with maximum responsibility for a major and distinct stage in the business process (Drucker 2007a: 177). The related activities are brought together into one department with a production manager and then there are the sales managers, responsible for selling the products, for example. This type of structure typically suits repetitive and mechanistic types of and approaches to work. One of the drawbacks to a functional structure is

that the coordination and communication between departments can be restricted by the organisational boundaries of having the various departments working separately. It can create a sense of 'empire building'. This could potentially be seen in museums that have expanded and developed into larger organisations. A matrix structure has the similar vertical chain of command through departments, but also includes a horizontal aspect. The matrix structure is put in to answer the issues within a functional structure when undergoing non-standard processes, like a project. In order to maintain the strengths of a matrix structure, there needs to be excellent internal communications, as the lines of responsibility and management can be confused, and there is the potential for increased power struggles (Hannagan 2008: 276). Some organisations design a combination of function and matrix structures. It can be assumed that institutions are homogenous and that the whole organisation should be organised in the same way. However, as shown with the consideration of the different tasks and how the organisation can fit and efficiently facilitate that, there is usually a need for a number of different organisation structures co-existing alongside one another (Drucker 2007a: 55). A divisional structure creates satellite-like entities which are accountable to the 'parent' organisation, but have a significant amount of autonomy. Federalism is a group of individual groups allied together with a common entity and existence. In this sense, it is similar to divisional. Handy described it as being 'autonomous, with cooperation' (Handy 1992: 93), both of which may be similar in some ways to the Imperial War Museums. The project relevant here was in the Imperial War Museum London, but the overall capital project plan will include other parts of the Imperial War Museums group. It is also interesting to note that the Science Museum is also a group of institutions brought together under one branding and identity.

For museums after a major project, it may be the case that afterwards the previous way of working as an organisation may no longer be the most efficient way. Therefore, it is important to consider before or after projects in museums whether they should include work on the reconfiguration of the organisation, so that it can function efficiently afterwards. In a 'post-project' environment, a functional structure may create a structure that is too rigid for the staff and departments. It is often the case in

projects where the staff may have the feeling of 'getting back to normal' after the project has finished. This, of course, has links with appropriate leadership and management, as shown in the interviews, where the senior management do not see this as the case. The senior management in charge of the projects and overall change for the organisation need to focus not only on the management and structure needed, but also the leadership. If you do not take the staff with you during the change, then you leave them behind in the old structure. Sandell and Janes refer to the reflexive management approach and refer to open-ended change (Sandell and Janes 2007: 3). Adjusting in the new post-project world is then very difficult or even near impossible without having taken on and embraced the project journey too and having appropriate structure afterwards.

### **(Re)designing the Museum Organisation**

As a general structure, organisations are usually made up of several subsystems: technical core, technical support, administrative support, and management. Organisation design also considers the dynamics related to organisation dimensions. There are two types: structural and contextual dimensions. Structural considers the internal characteristics and, therefore, a basis on which different organisations can be compared. Contextual describes the whole organisation, including its size, goals and environment (Daft 2004: 17). Using these dimensions, organisation theory can explain and understand why and how an organisation can both be improved and measure the effectiveness. Strategies can then be developed in for the open system organisation to react and change to its environment. The focus (internal and external) and the structure (flexibility and stability) enable managers to choose which approach and reaction is most appropriate so that the organisation can succeed in its goals (Daft 2004: 75). For museums to take this approach, the considerations should also involve at its core the role and mission of the organisation. With capital projects, there are physical changes, and also opportunities to adapt and change the structure of the organisation with the realigned mission, role, and aims. As shown in the interviews, many of the museums underwent capital projects and changes that brought in commercial and other new aspects to the organisation. Much of this influence comes from the environment and its open system. However, ensuring that the organisation is

changed and developed in order to create and continue these roles is important. In some cases, new departments and teams are added to the existing organisational structure, as was the case with the Ashmolean and the Victoria and Albert Museum. The Ashmolean added a senior commercial role, operations role, and Museum Services (my team, which included mountmakers and display technicians) who operated in a matrix-type structure where we had the flexibility to work across all the departmental lines within the organisation. The Victoria and Albert Museum created a whole Project Department as they had significant capital project plans for a ten-year programme (FuturePlan).

Within one organisation, you can have a number of sub-structures – particularly depending on the functions of the groups within it and also the overall size. It also depends on the organisational culture and expectations of the work force. This is another key factor, as there are many variables when understanding capital projects and museum organisations, and they all need to be taken into account. A museum's structure can often be focussed around the collections subject area, which links to the way they were created and how they were managed subsequently. It is important also to retain the specific collections knowledge and hence they are often structured with that as a focus. 'In museums, organisational structures have been designed through tradition' (Fopp 2001: 148). A weakness with the functional decentralisation principle is that every manager of their area considers his/her function to be the most important one. This can also lead to narrowing of goals, skills and loyalty which is unfit for general management (Drucker 2007b: 180). With the distinction of subject specialism in museums and collective expertise in one area of the collections, it means that the departments which have the same line of reporting are all competing for the same available resources, such as the technician, education, exhibition teams etc.. This situation immediately creates an 'us and them' attitude and culture, which can be seen between curatorial departments. It also creates blurred lines of communication from the curatorial/collections side of the organisation to the services teams and departments, which can also create tensions and mixed messages. The departments will not have the same overall perspective, goals and strategy. This type of structure is activity focussed, however, the structure is not fit for purpose and the performance



and efficiency is affected as a consequence. How projects are carried out in this type of environment varies depending on the museum, and is a key thing I looked into during the case studies in order to assess whether the museum structure and culture affects the successful delivery of the project, or do projects influence and lead to organisation structure and culture change.

Following the fieldwork and interviews, there are two examples of museum organisational structure change before, during, and following a capital project. The Victoria and Albert Museum have substantial records on their development throughout FuturePlan, and the Ashmolean granted me access to the records of the institution and the project. Although these give a good opportunity to do an in-depth assessment of these museum organisations, it should be highlighted here again, as it was in the project parameters and limitations that these are examples, but there will be opportunity for further research to broaden out this understanding using more case studies across the rest of the UK. For this research, I am using examples that I had good access to and were representative of different types of museums (national, university, local authority).

The V&A went through substantial physical change since 2001, and has spent millions of pounds on projects and, as described in previous chapters, changed the museum physically, but also the organisation itself changed too. In terms of the senior staff, three of whom feature in this research project, since 2010, the structural changes included fewer collections focussed staff and more operational and heritage experienced individuals at the senior levels. As shown in Appendix 5, the structure is a very steep leveled senior management section, with five reports into the V&A Director (Mark Jones). This is common in many museums and is also reflected in the Ashmolean too in Appendix 6-12. Here, I will use the V&A and Ashmolean as organisation structure examples to explore how the structure evolves before, during and after a capital project.

The Ashmolean submitted its organisation structure as of 2003 as part of its application for the £15 million Heritage Lottery Grant (Appendix 6) which showed a relatively simple hierarchy structure. The service aspects of the museum (Security,

Personnel, IT, Finance etc.) reported into the Administrator; Development (fundraising) had a Director of Development; Collections, Education, Design, and Exhibitions had an overall Director. All three Directors then report into the Deputy Director, who is the only senior reporter into the Director of the Museum. This is the Ashmolean museum structure before the capital project was created and carried out. Moving onto 2006, the Ashmolean organogram shows a change in shape and additional areas added to the structure (Appendix 7). Here we can see that the project (AshPlan) is a completely separate area that has been plugged into the museum organisational structure. By 2007 (Appendix 8), however, the organisation shape is streamlined and divided into three areas with AshPlan (now called Redevelopment and Redisplay) included under the Collections section, and Education has moved under Development from Collections, making a division between curatorial and education. In 2008, there are two separate capital project related teams in the museum. One is in the Collections section and the other in Admin and Finance with no reporting connection (Appendix 9). By 2009, some of the collections team had moved over to the Admin and Finance team, and lines were indicated between both teams (Appendix 10). The museum project was mostly completed and opened to the public in November 2009, which shows how, even towards the end of the project, the project approach and how it fit with the museum organisation shape was still evolving. Following the end of the major redevelopment, the Projects Team in 2010 moved under the 'Collections' section (Appendix 11), but by 2012, they had moved over to Admin and Finance again (Appendix 12). This shows the changing needs of the organisation and how they use and manage their project team within the organisation. My role was in that team for the most part of the years discussed here and also as the line manager for the other members in that team. The identity and role of the team did change within the organisation, and the size of the team was adjusted depending on the project needs. I was line managed by the Director, the Operations Director and also the Deputy Director (Collections) at different times over that period. But this also fit with the way in which I had set up the team. In order to deliver the high level of work needed for the project in time for the November 2009 opening, and make up for the delays elsewhere in the programme, we needed to work in a more fluid and flexible state across the three divisions of the museum. As we were owned by all the

departments, the intention was that everyone felt they could both come to us and also work with our common goal. However, the difficulty was that it could also feel that no-one owned us and we were not part of the main structure of the organisation. A move towards inclusion as a Museum Services team was developed after this period, which meant a more permanent presence and additional freelance resource would be brought in depending on project needs. It shows that the organisation structure, for non-project related roles, was not changed that much, apart from the senior staff. However, the project team and where they reported into did. Also, following the project completion, some of the team was retained which kept some of the institutional and project knowledge.

For the V&A, the organisational structure was changed regularly between 2010 and 2017, and would be done so on purpose and also to reflect staff changes at this level. In the November 2010 version (Appendix 5), the V&A's structure changed so that it adjusted following two members of staff leaving (Blatchford and Anderson) and this meant that McKillop became Deputy Director, with responsibility for collections and education, which the Museum Association described as a 'radical' 'revamp of the senior management structure' (MA 2010). In 2012, the senior staff structure was a steep 2-level shape with four people reporting into the Director, but in 2013, this was changed to 3 levels (V&A 6). This coincided with the arrival of a new title of Chief Operating Officer (COO), to whom three of the four roles then reported into. In 2016, the role of COO is changed to COO and Deputy Director, the separate role of the Deputy Director is made redundant, and a new role of Director of Research and Collections brought in (V&A 7). Throughout this period, there is significant change to the organisation with FuturePlan and the DCMS cuts in funding and difficult economic climate. What is shown in the senior management is that the reporting lines go from flatter to more steep in shape, which is different to what is recommended by organisational theorists like Drucker and Handy. However, what can also be taken from this is that there are fewer senior staff, meaning that this could have been done for financial reasons to accommodate for the cuts. The other change, which correlates with what was shown in the interviews, is that the education and experience background of those in a senior position at the museum are moving from a collections

focussed experience to one more related to heritage management and museum management.

Responsive management relates to these ideas of reacting and accommodating for the changes and these 'new forms of planned change will make museums more responsive, both to their internal specialists and their external users' (Fopp 2001: 177). This can explain why the shape of the senior team changes regularly in both museums and responds to the external environment, but also the major projects that change the focus of the museum at different times. It means that an organisation is structured in a way in order to enable it to respond quickly and act more flexibly and fluidly to the changes in the environment. It is very important, as discussed in the previous chapter, for the museum to fulfil its role and adjust itself in response to the relevant external influences, and projects and project management are a way in which this can be carried out. Museums need to be responsive to their audiences' needs when developing and making plans (Lord & Piacente 2014: 24) and adjust appropriately and realistically, choosing target audiences and shaping the project around how to reach those common goals.

There are vast differences in organisation structure according to the nature of the task, and a structure with the fewest levels possible should enable the organisation to be what is needed for that particular task (Drucker 2007a: 56). If there is no 'essential' point and no competition, like that is faced by commercial companies, then museums will only change when forced to. This is also why non-profit institutions such as museums can often be seen to be against and struggle with change (Janes 2013: XV).

"The learning of techniques to help cope with the changing environment and culture of the museum framework is fundamental to the successful future of our museums" (Fopp 2001: 5)

Museums are in swiftly changing environments and capital projects are a way in which they can control the change to the organisation, but they need to ensure that the shape of the organisation is also considered. They will be judged on their ability to be more relevant and useful to what is now a more demanding environment.

Functionality, relevance, value for money and sustainability are all major factors in the continuation of the museum's existence and position in society. Does it remain as an education tool, leisure and tourism activity, well-being and lifestyle entity? With so many options, are there too many factors and stakeholders? By ignoring their external environment and churning through their processes and systems and ignoring the needs of the audiences and stakeholders, they will then lose their relevance and, subsequently, their position in society. Having a responsive and adaptive approach and working in an open system will enable the museum to recognise more the need to adapt their internal organisation. Projects in museums can enable and be a vehicle for this change to happen, if it is factored into the open project management (OPM) flexible-framework.

### **Projects as Boundary Objects for Museums**

A useful theory to consider when we examine museums and projects is the notion of projects as boundary objects. Boundaries and environment are the total set of outside forces that the organisation affects, and is also, in turn, affected by. Bergman explores boundary objects in design, which enable ways of working and modelling entities in order to 'create shared representation to bridge functional knowledge and stakeholder power gaps across different social worlds' (Bergman 2007: 546). Although Systems Analysis and Design (SAD) is for Information Systems, the ideas discussed here are also relevant to capital projects in museum organisations. Bringing about substantial physical and organisational change involves multiple stakeholders, and being able to discuss and manage across them all. In museums specifically, the stakeholders include the internal museum staff, the collaborators (funders, museum board etc.) and the audiences. Being able to analyse all of the environments and 'ecologies' through the different lenses, including political and functional, means that it is possible to design boundary objects that can carry across a shared understanding and way forward (Bergman 2007: 548). A social and cultural lens should also be brought into this discussion when referencing a museum organisation and the 'boundary objects' that can bridge the different worlds of museums, management, and project management. 'Boundary objects' need to be designed that are perceived as correct and valid 'so that the recipient...will trust and rely upon them' (Bergman

2007: 552). For example, this could be a project plan, which could be designed and written to make it relevant across all of these areas and bring museums more into the overall processes and management of a project. This is currently done with internal and external project managers, but could be done with more of a focus on designing boundary objects that share the knowledge gaps and areas between the different environments. Vavoula and Mason take this concept and translates it into a museum digital project context, where 'Intermediary Design Deliverables (IDDs)' are created to mediate boundary crossing between museums and digital design teams and establish 'shared knowledge, viewpoints and approaches' (Vavoula and Mason 2017: 252). In order for it to survive and operate effectively, an organisation needs to be able to communicate and react appropriately to its external environments, as well as maintaining an understanding of the boundaries within which they all operate. The 'external linkage' between the organisation and the environment is just as important as the internal workings in order to develop and remain valid within it and also to adapt and change in it (Hodge and Anthony 1988: 138, 142).

### **Influence of Funding Sources and Commercial Behaviour**

One major influencer for museums from the external environment is funding, more specifically, its sources. As discussed in the previous chapters, the culture of museums stems from a non-profit approach and a role that focusses on education and public communication. Therefore, the fact that museums are so directly affected by funders can feel like a clash of cultures, and museums should be above this. However, what is clear from the interviews and the fieldwork exploring capital projects in museums is that museums can still retain their integrity and their mission, but also attract more diverse sources of funding and create their own change through projects. Many of the projects discussed in this thesis, and many more besides, have received substantial funding from the Heritage Lottery Fund (HLF) and other trusts and foundations that regularly support capital projects in museums. Many times, they are the largest funder overall, which was the case for the Ashmolean redevelopment project. Their grant of £15 million was the largest single award for this project and was pivotal in attracting further funding from other trusts and foundations, as well as significant private donors. But what can be seen in the interviews is that the influence of the external

fundings to the museum project, and therefore the museum structure and overall organisation, is not seen as a bad thing at the senior level. The financial support often came from a funder with staff experienced and skilled in museum capital projects, who were able to advise on particular aspects. For example, Brown (Ashmolean Director until 2014), Mayhew (Deputy Director – Collections) and Thorpe (Deputy Director – Operations) all spoke of the role of the HLF as a funder, but also in terms of their advice. Brown and Mayhew spoke in particular with reference to the contributions and advice received with regard to the interpretation of the galleries and helping to ensure that the voice of the curators was heard, but also target audiences included in the development in the right ways. Therefore, it shows that the funding bodies for museum capital projects hold a significant amount of experience and expertise in this area, and could also be included as a resource for future research and development of the area of open project management (OPM). OPM, as discussed in previous chapters, should be developed to include a flexible-framework through which the museum organisation culture should be accounted for and taken into consideration, but also the organisation structure is equally important. As stated earlier, ideally, the museum structure should know the parameters within which they are willing to adapt and change and still serve their role and mission as an organisation. But they should also know how to adapt within their existing structure and therefore be able to change in a more fluid way when undergoing projects and overlaying the flexible-framework of OPM onto the museum's organisational structure.

As explored in the last chapters, the need for organisations to be able to adapt, change and learn in order to remain successful is a view that was widely held and supported. This is the case whether that is in a commercial or non-profit environment. Walhimer describes museums as 'inherently' different from other businesses, because museums' goals are to meet their 'mission', rather than make profit (Walhimer 2015: 104). Due to the changes in the laws in the 1980s, further education colleges etc. were able to work in a more commercial manner. This was not only done for economic reasons, but also to raise morale, to show and encourage entrepreneurial aspirations and approach. However, the issue is that it can cause conflicting priorities (Hannagan 2008: 126). Museums, overall, have been forced due to political, economic, and cultural

change to overhaul their organisation structure, approaches to management, and assessment of performance due to the environment in which they work and because they are in an open system and need to listen and respond to their audiences in order to engage (Lord & Piacente 2014: 194). All organisations are in open systems and, therefore, in constant change. In order to deal with the uncertainty of aspects outside of the organisation, an organisation can create 'buffering' to protect themselves from it by bringing the uncertain areas to within the organisation or allocating resources to deal with those particular areas, such as sales teams to deal with customers (Pugh & Hickson 2007: 64). Hence, organisations should be made up of various components, rather than a one-line hierarchy that leads straight to one person at the top, much like the original very early organisational structures on which some of the scientific management was based. Capital projects in museums are funded by external sources and the opportunity to bring a substantial level of external funding into the museum is difficult to turn down. It brings about significant physical change to the museum, but also brings in short-term roles, including project managers and new ways of working, such as fundraising. For example, with significant funding cuts museums are entering into more fundraising focussed areas in order to replace the money lost. The commercial and fundraising activities are a larger part of organisations as a whole and also feature more in the job descriptions of higher management roles, particular senior managers, such as 'donor management'. New Director roles are stressing the need for active fundraising and the need to access funds from independent funders, not just local authorities, including the new Directorship for Norfolk Museums and Archaeological Service (Norfolk 2014) the Directorship of the Sir John Soanes Museum (Soane 2014), and the Director/Senior Curator for the Bucks County Museums Trust (Bucks 2017). Many institutions have been restructured in order to accommodate more fundraising activity, because it is fundamental to the continuation of museums and their activities, such as Museums Sheffield and the Museums of Oxford University. Quite often, roles are specifically linked to capital projects and the fundraising needed for them. When the post of the new Director/Senior Curator for Bucks County Museums Trust was advertised, the financial and operational aspects of the role were clearly laid out in the job description. The emphasis of the role was on the fundraising and financial management, as well as leadership of the twenty-five staff. Immediate



reference was made to the movement from being part of the local authority to an independent trust, as well as the Heritage Lottery Fund application and plans for capital redevelopment. The advertisement also included the notification that the Trust had applied for National Portfolio status through Arts Council England. Although the advertisement closed in March 2017, and the announcements for funding were released in June 2017, it is clear that there is an intention for the Trust to access a variety of funding sources and adapt their mode of operation in order to become sustainable.

Private and public sector organisation and management varies in its main aims, but the theories and practices are in fact very similar, despite the different cultures. Similarities include control of people, knowledge of purpose, achievement of an objective, practitioner experience and a need for adaptation to new organisational cultures (Hannagan 2008: 105). Essentially there are two main differences in strategy and purpose between private and public sector. Private sector is profit and customer driven, whereas public sector is service and patient/student etc. driven. Due to the political and economic changes and pressures over the last few decades, there has been a significant change with private sector management practices being brought into the public sector (Hannagan 2008: 112). Similar concerns are described by Griffin and Abraham with reference to the economic and political changes that impact on museums (Sandell and Janes 2007: 104) and how leaders manage to respond to the external changes and communicate this internally to the organisation effectively. The culture of organisations has changed, including the idea of 'a job for life' and new styles of organisation have developed (Hannagan 2008: 83). For local authority museums and some trusts, the end of particular government-related funding streams has made a significant impact, particularly at a time when local authorities are making so many cuts, which has resulted in the loss of some museums, and some museums becoming separate independent entities. The Department for Culture, Media and Sport (DCMS) Business Plan 2010-2015 (DCMS 1) laid out the high level plan including the end of Museums, Galleries and Libraries (MLA) and the plan to channel funding for museums through Arts Council England (ACE). The reapplication of museums for the money also resulted in some museums not receiving any further funding and being left

with the issue of how to deal with effects of loss of that funding stream. Having been through several rounds of applications since 2010, it is interesting to see the changes in funding models and the effect on organisations. One of the museum professionals interviewed as part of this research is Lucy Shaw, who spoke about this area of funding with her previous experience managing projects and current role as head of the Oxford University Museum Partnership (OUMP) which is wholly funded as part of an Arts Council England National Portfolio Organisation (NPO) grant. In the round of funding for NPOs through Arts Council England, announced in June 2017, the OUMP received 10% less overall funding across the four-year grant (2018-2022), whereas other organisations in Oxford received the same as previous years, while one gained a 25% increase (ACE 1). There was also a new organisation added in Oxford that was not funded in the last round. With slightly longer lead-in times for these government sources of funds than many project funders, organisations are able to make accommodations and plans to seek to diversify their funding bases, much like Bucks County Museums Trust aims to. However, it is also important to highlight that the two larger grants total are over £3.5 million and £5 million, while the others are between £700,000 and £1.5 million. With the level of funding differences, there is more realistic ability for some organisations to take a cut and survive, whereas others will be more deeply affected. One of the smaller organisations (Pegasus Theatre, Oxford) has changed its staffing structure to enable it, among other things, to work more efficiently from a financial perspective. This has meant that many of the very experienced staff have become freelancers and are only paid on a project basis. In some ways this works, but in others, it means that the staff themselves do not have the security of a fulltime paid role, with holiday/sickness pay, pension etc. It also means that the organisation may lose them entirely should the individuals gain employment elsewhere. Such examples of funding sources and levels affecting the organisational structure can also be seen in museums as they have to be sustainable in order to serve their mission and survive (Lord, Dexter Lord & Martin 2012: 6). Many of my roles as a consultant/freelance project manager have been short-term (up to two-year projects) to deliver a specific project.

'Value' in museums is not focussed on financial gain, but is 'experience driven' (Moore 1994: 244). With the increase of independent museums, the organisation structure has to be designed to ensure that the museums remain relevant and attract the necessary volume of visitors, without losing integrity (Fopp 2001: 4). Management in museums is now considered to be needed for museums of all sizes and its adoption has been encouraged by an increasing insistence by funding agencies. Once again, this shows another of the external forces that affect museums and influence their organisation structure, culture and development (Kavanagh 1994: 34). Funding issues can have major influence on change in museums and the continuous decrease in public funding has been a major factor, although not the only one, leading to significant change in organisation structure, such as that seen in Glenbow Museum (Janes 2013: 14). Sometimes it may be necessary to consider how to change the culture and behaviour of an organisation, and this can be done through changing the structure. An organisation's culture is interwoven with its structure. This, as shown at Glenbow Museum, will never be a quick, easy, or completely happy solution. It is certainly a difficult journey, but one that may be necessary in order for a museum to survive. Glenbow underwent a 'dynamic reshaping of the organisation design' in order to do so (Janes 2013: 172).

With commercial organisations, a SARFIT (structural adaption to regain fit) model can be applied, which means that the principal structural features of an organisation need to be constantly adjusted according to the external factors that bear upon it (Pugh and Hickson 2007: 217). For larger museums, such as the Victoria and Albert Museum (V&A) and the Imperial War Museums, this may be possible, but for much smaller organisations where there are very few staff, all doing very broad roles, there is less capacity to change so quickly or so often. The Ashmolean has expanded significantly since its beginnings in 1683 and the structure has been built on subject areas relating to the collections, which reflects the priorities of the museum since it was created. Over the last century, additional departments have been added in order to accommodate new developments such as Press, Visitor Services, Education etc.. The focus has moved from collections to include a visitor and commercial focus following a decrease in public funding (Sandell and Janes 2007: 2). Another telling change is that

the Director role was previously known as the 'Keeper of the Ashmolean' – a role that Sir Arthur Evans held when he was in charge of the Museum at the turn of the last century. The V&A is a far larger organisation, as most of the national museums are, and has created even wider roles within Departments – Project Management has its own for example, so that they can manage the wide spread of projects all running concurrently across the museum. A divisional structure means that each section can concentrate on their particular role and do it well. Drucker's research highlighted that sometimes historically meaningful groupings within organisations would often no longer make sense and instead become obstacles to proper performance (Drucker 2007b: 170). Donaldson's theory of SARFIT is based on performance based change, but he does also recognise that managers are limited in what change they can realistically bring about in an organisation (Pugh and Hickson 2008: 223). This shows in the literature and also in the fieldwork and interviews that OPM should include the matrix structure and could work well for museum organisations who are undergoing projects as well as serving other roles and audiences as an institution.

With some organisations removing these levels of hierarchy, it also leads to the promotion of growth, development and self-worth of the staff (Sandell & Janes 2007: 91). Janes discusses the change in shape of the organisation at Glenbow Museum, and how the aim for the flatter organisation was to empower the museum staff and give them more access and make it easier to communicate (Janes 2013: 89). However, the result in many cases with the staff was a feeling at organisation level of inadequate resources to fill the gaps in the new organisation shape, and then at an individual level, there were some members of staff who were unable to move beyond the 'core' role they had previously had (Janes 2013: 90). Projects are temporary situations, and some members of staff are keen to get back to normal afterwards. But what is evident is that some museums adapt and change their organisation structure in response to the new external factors, but some museums only temporarily change for the project and then return to a situation which is very similar to the original. This can be seen in the example of the Ashmolean Museum and their redevelopment. The Departmental shape before and after the project (completed in 2009) look very similar, and many of the curatorial roles remained the same. What can also be seen is that some

departments are added into the Museum to address specific needs, such as commercial and there are new reporting lines specific to the projects. The Imperial War Museum (IWM) reacted to a variety of external factors, including the change in the audience needs and the cuts in funding from the government. Lees, the Director-General of the IWM group, described in her interview with me some of the changes made as part of the need to make the museum organisation 'fit for purpose' to the current climate and moving into the future. This included a series of assessments of need for the museum, some job losses as a result, and redevelopment projects, such as the redevelopment of the entrance and galleries at IWM in London which opened in 2014 for the Centenary of the beginning of the First World War.

The issues with museums responding in this way and changing the shape of the organisation, is that the fewer remaining staff have increased workloads, less resources, and risk losing the creative aspects which is one of the main motivations for working in a museum. Attention to motivation is essential for a good and effective management culture, as well as being aware of the individual and their motivations for creativity and ownership of the developments (Lord and Dexter Lord 2009: 75). Again it is the motivation of the individuals of the organisation that will ultimately make it a success and also how well they embrace and partake in change in the new museums. 'Change in museums, as in all organisations, must evolve in a way that sustains commitment and individual capacity' (Sandell and Janes 2007: 6). With the commitment of the individuals collectively, the organisational structure is irrelevant, and is why effective leadership and management is so important. An important point to remember is that an organisation is made up of people. Without the people working collectively within it, it would not exist. Complexity based approaches require attention to be focussed on processes and relationships, rather than 'mechanism, structures and heroic individuals' (Janes 2013: 240).

## **Conclusion**

This chapter has addressed the role of projects in museums by exploring the theories related to organisational structure and their response to their environment. In this age of ever increasing research and understanding into organisation theories and also project management theories and practice, museum project management needs to be

included in this in order to maximise their effectiveness, particularly within this period of decreasing funding. As discussed here, the structure and environment are fundamental to the agility of the museum in periods of change and particularly important when carrying out museum projects. Organisation structure should be built around information and communication, rather than hierarchy (Drucker 2005: 115) and, therefore, organisations need to be able to have a structure which can ensure that a balance between keeping their core mission and the economic realities (Sandell and Janes 2007: 3). One of the functions of an organisation's structure is to make the human strengths effective in performance and minimise human weaknesses (Drucker 2005: 120). Museums are organisations that thrive on collective human strengths, and the structure of the organisation and project management need to also reflect and support this.

The organisation structure is also meant to assist the alignment of the employees' work and overall organisation's aims and objectives. A good structure in itself is not enough to ensure good performance, however, a poor organisational structure would make a good performance impossible (Drucker 2007b: 195). An organisation is made up of processes and procedures and many other elements, but none of these is more important than the people within it and, ultimately, how they are managed. During any project, the management style should work with the culture and structure in order to create the most effective organisation (Pettinger 2012: 101), which should also include project management. But the methods and theories that a contemporary museum use and favour can also become an obstacle to change, and some museums are also in 'denial' about an organisation's state (Janes 2013: XX). The structure is composed of all the elements that need to work together involving activities that collectively result in the organisation's aims. With an appropriate structure, it is made more possible and efficient to reach the common goals. Museums will need to continue to adapt, develop and prosper, and they will need a structure which enables them to do this, as well as staff that accept and work as part of this. An organisation's structure and culture is determined by the people within and the leadership and management styles by which they are guided.

Museums, like any organisation, need to continue to learn, grow and change, which can be done, as well as retaining the fundamental core values of being consistent, valid and grounded. Museum organisational structures ensure a division of work and a system of accountability, which is important for all organisations, but particularly non-profit and publically funded ones. Looking to the future, museums will need to continue to adapt and evolve in order to remain relevant to their audiences, and part of that will include creating structures and plans that can react to change in more innovative ways. With change being forced onto museums due to funding cuts and the need to creatively find new sources, they are being seen more as survivors and breaking into new 'markets'.

“the reasonable man adapts himself to the world, while the unreasonable one persists in trying to adapt the world to himself” (Handy 1992: 4)

Fundamentally, museums will continue to change and carry out projects, but what is clear is that to ensure their future, they will need to continue to learn how to adapt and survive through projects but also as an organisation.

## **Chapter 6**

### **Open Project Management (OPM): new creative and context-based model**

#### **Introduction**

This chapter explores project management in a museum context, building on the research relating to museums as organisations with their own structures and cultures. Looking at the history of theory and practice of project management in various different non-museum environments, this gives a context that can be then aligned with examples of museum projects and the processes and approaches used within them. Developing from these, the evidence and conclusions drawn from them will lead to a concept of project management for organisations like museums that is a context-centred, flexible and responsive model. Following what has been a unique era for substantial capital build projects in museums, it can be seen through the case studies that the existing orthodox project management approaches do not work as well in creative and open environments like museums. What this thesis suggests is a model of responsive and context-based project management (Open Project Management – OPM). OPM would be able to be adaptable in its approach to multiple organisational and industrial environments.

Although project management has been extensively researched (Mingus 2001, Berkin 2005, Kousholt 2007, Crimm 2009, Scwalbe 2010, Curlee & Gordon 2011, Kaufer 2012, Lock 2013, Leach 2014, Richardson 2015) recent literature does not often take a museum context into consideration. Project management is the application of processes, methods, knowledge, skills and experience to achieve the particular objectives of a project. Projects are temporary entities, where planned objectives are achieved and success criteria are carried out to a particular budget and timeframe, and can also be defined in terms of outputs, outcomes or benefits. Effective project management is crucial to the success of almost any project (Berkun 2005: 3). However, the uniqueness of each project may also be related to the environment in which the project is taking place. The non-profit environment, and more specifically a museum one, is one that had evolved over a long period and, therefore, encountered and



delivered many projects, but perhaps has not recognised them as clearly defined projects that have been managed. Keeping in mind the main question of my thesis – how do museum organisations adapt and change during projects – project management theory and practice plays a fundamental role in what those adaptations and reactions are.

### **History and Development of Project Management**

Project management can be defined as the ‘act of planning , organising and managing resources to successfully complete specific project goals and objectives’ (Lord, Dexter Lord & Martin 2012: 541). The history of project management as we know it today is a very recent one, but, in reality, projects have existed since humans began organising themselves to do things. The ancient wonders of the world are some of the best examples of this happening – and they certainly all needed an end-to-end process to carry them out, which means we actually have thousands of years of practical experience to draw upon (Lock 2013: 6). Projects have similarities between them and each project will always have a set of requirements, parameters in which it can work, as well as constraints. Projects need planning, monitoring and reacting in order to maintain understanding and, therefore, control of the project. The end results and aims of the project must be reached through the combined efforts of multiple stakeholders and units (Richardson 2015: 131). Many types of project management methodology account for all these parameters and needs. However, what is missing is a project management method that accounts for the creative and responsive needs of organisations like museums. The theoretical basis of project management should enable us to understand what the most appropriate methodologies are for each project. But as I have explored the many areas of organisational and management theories, I think it is fair to say that the area of project management seems to be more practically focussed and it is not often that theories are extensively written about, developed or interrogated. In fact, several relevant authors (Kousholt 2007, Dinitzen & Jensen 2014, Richardson 2015) do not talk about specific theories of project management. In the project management research field, the branded ‘Project Management Body of Knowledge (PMBOK)’ is put forward as an answer to the lack of theory through establishing a ‘conceptual architecture’ (Richardson 2015: 23). It is

more about how the processes are written and structured and then how it works in reality when people are involved in the end-to-end processes. This is often illustrated with cases studies and references to organisational or motivational theories. This can make project management feel more temporary and like an additional level added on top of an organisation. If there is no theoretical underpinning of the methodology, then it is a case of a project happening, ending and then the project manager moves on, the project team disperses. This links to my initial question as to how projects affect organisations and how, in turn, project management is affected by museum organisations. Sometimes, project management can often feel over-processed and unrecognisable when added to a museum organisation, and this could be why museums undergoing capital projects opt to bring in so much external project management expertise. The emphasis on processes, tangible outcomes and budget and timetable can often bring about a culture clash in some environments, but museums have been undergoing significant changes due to the financial environment and political landscape and need to respond to the economic and political influences (Lord, Dexter Lord & Martin 2012: 224).

### **Museum and their Environment: operating in open systems**

Museums are not unique in this and there are arguably other similar organisations that are affected in similar ways by their environment. This is why this thesis argues that an open project management approach would be more effective, rather than the strict and linear 'critical path' approach from more industrial environments.

As discussed in the last chapter, the role of museums is affected by their environment, including social, political and ultimately financial influences, because they are open systems and, therefore, affected by the variances in their environment. Museums in the UK have been affected by the changing funding streams, including government, individual donor and trusts and foundations. In the last decade, there have been significant funding streams through the Heritage Lottery Fund (HLF) and other museum focussed opportunities for capital projects. It is clear when you look at the donor recognition lists of any major museum that there are some regularly credited entities without which these capital projects would not have happened. The capital

projects included in this research are multi-million pound redevelopment projects, which often include a significant proportion funded through private donors and trusts and foundations. Since I began this research, there have been significant changes, including Labour creating a postmodern crisis where museums have had to reach out more and have a broader and wider role (Janes 2013: 9).

Many of the museums in my case studies are recipients of Heritage Lottery Fund (HLF) funding, which contributes a significant contribution and includes a very stringent and 'project plan' approach to applying for the funds. Projects that go through this in-depth process successfully then give confidence to other funders and helps lever funds in that way. From my perspective, the HLF application process and the support given to those that apply, is actually good, effective training for museum staff in project management, particularly at the planning stage.

"Museums have been significant beneficiaries of National Lottery good causes: primarily from the Heritage Lottery Fund (HLF), but also from Arts Council England (ACE) and the Big Lottery Fund. Every single member of the NMDC has received significant investment from the Heritage Lottery Fund, be it for major capital development, acquisitions, major projects or as investment in workforce skills. Furthermore, investment by one of the lottery distributors then levers in significant additional funding, as they are known to be a trusted and reliable funder." (NMDC 2)

Some museums may react by hunkering down and focussing internally, while others become more community focussed and led. Developing and undergoing major capital projects can in part be seen as a way to address some of these expectations, by enhancing physical facilities and providing a broader offer for audiences. Extremes of any reaction can have negative and positive results, and as Griffin highlighted, remaining true to the museum organisation mission and engaging 'meaningfully' is important to keep in mind (Griffin & Abraham 2008: 47), particularly during periods of organisation change through capital projects. The Imperial War Museum (IWM) completed the first phase of their redevelopment with 'Transforming IWM London' in July 2014. In their evaluation (IWM 2) they referred to the difficulties of carrying out a

capital project during that time, due to the environment, which included a challenging 'economic climate' (IWM 2: 13). It meant that the quality of some of the contractors was not as high as expected, and there were fewer contractors operating in the marketplace due to the recession. Those that did price for the work priced at a higher level as they were accounting for the higher risk in large capital projects (IWM 2: 12). The issues that have followed with some capital projects include sustainability following the influx of funding from a capital project. When planning and delivering a project, the museum also needs to be realistic about what shape and structure the organisation will have in terms of staff, so it knows what and how it can deliver in terms of programmes, and the increased costs of running a larger and higher specification building.

"Staff are connected across the multiple [IWM} organisations. We had silos, lots of silos, and we had been working to break those down. The structure of the museum was getting in the way of people working together...We went from five Directors to three, we have centralised marketing, centralised learning teams – this is a cleaner and better streamlined way of working...two layers from managers were taken out from areas across the organisation. We got the principles of leadership and organisation going forward. Subsequent change projects can come from this." (Lees 2016 Interview)

By planning and shaping the organisation's structure, the shape will enable and support ongoing development going forward.

Museums as organisations need to serve their audiences and this is often a central focus of their mission. Their audiences include their visitors, local communities, their peers, and the organisations they report to (government, university, local authority etc.) and the museum needs to ensure that it evolves and takes all their needs into consideration, as much as possible, in order to remain relevant to them. Martin Roth, Director of the V&A 2011-2016, stated that 'what happens outside the museum needs to be reflected inside' (V&A 2: 14). Black goes as far to say that 'museums need to connect with these new audiences or die...they need to both grow the active support of the traditional audiences and develop new ones' (V&A 2: 70). The main mission and

aims of the Victoria and Albert (V&A) Museum were outlined by Moira Gemmill, previously Director of Design and FuturePlan, as being founded to educate designers and manufacturers and the public in the principles of design and FuturePlan, the museum's ambitious programme of capital projects, had also driven 'change in the V&A's internal culture' (V&A 1: 4) showing the development of the museum both physically and from an organisational structure and culture perspective. Mark Jones, the V&A Director between 2001 and 2011, highlighted the role of the museum in relation to its environment by saying that the V&A is a 'public institution' and the 'idea is that the way in which it develops should align with its mission' (V&A 1: 9). This is something that was explored and discussed when Jones was interviewed as part of my fieldwork. In addition, one of the V&A Trustees, Steve McGuckin, stated that 'people's expectations of museums and how they want to use them...are changing rapidly' (V&A 1: 11) which shows the museum's recognition of their role and the audiences they serve, and how capital projects can be part of reaching their goals and organisation mission.

The starting point for most projects is the need for change. This can either be one particular thing or a series of changes that will culminate in a more long term series of changes. Black introduces his book 'Transforming Museums in the Twenty-first century' with an outline of the drivers for change in the museum world, which include financial challenges, uncertainty of what and who they are for, as well as the challenges of new technologies and the internet to galleries and exhibitions (Black 2012: 6). These issues can bring about new opportunities to create new ways of doing things within the organisation, even if that period of change is painful and difficult. McGuckin said that 'the story [for FuturePlan] is broader....it's actually about reacting very positively to the way people are changing and the way they engage with galleries and museums' (V&A 1: 11). Ultimately, museums are part of and affected by their environments, so need to take this into consideration when developing projects and understanding what their aims are for it.

External influences in the environment mean that museums now need to change and transform, and there are further skill sets that are needed to complement what is already there, and the existing ones need to evolve in a 'post-modern' museum

(Azzarito & Kirk 2013: 198). To take this further, it may be necessary for existing roles to develop and evolve depending on this environment and needs of the organisation. The discussion around the nature of audience, public space, and public discourse in a museum is not new, but has evolved since the 18<sup>th</sup> century (Barrett 2012: 45). Sandell addresses many of these issues in his books (Sandell 2007, Sandell, Dodd & Garland-Thompson 2010, Sandell & Nightingale 2012, Sandell 2017) exploring the relationship of the museum and its environment through representation, ownership and the pressures on museums to lead in social activism and act as 'agents' of change (Sandell & Nightingale 2012: 1). With these far-ranging and important roles, it is clear that the role of museums has changed and developed, and audiences are expecting more from the organisation than before. It is also important that the 'additional' skills sets that can be brought in should not be 'parachuted in' directly from other organisations and that the museum team themselves need to be clear on their role. Good museum project management, and consequently a good museum project, means that the museum owns and is a full part of the process, as well as the end result.

### **Who is a Project Manager?**

As shown in the evidence from the interviews and case studies, there are multiple types of project managers and ways in which they are used both in and out of the organisation during a project. Even if museum staff are never intended to be project managers, they will more often than not end up working as part of a team on a project during their career. Staff and volunteers often work together on projects and a knowledge of what is involved and, most importantly, what the common goals are, ensures both the success of the project as well as a smooth journey as the project is carried out. Quite often staff are acting as project managers, but without the title and recognition of the role. The role and processes they follow are in fact coordinating, project managing and communicating in very similar ways, and it would be better to recognise the role and the processes as project management. Then, the individual can have that recognised and understood by the rest of the team and they will know how to operate, as well as also have their buy-in and support on the project. The recognition and appreciation of the role of project manager has increased and Black even refers to a similar role, although he calls it 'Exhibition Manager'. This role is

needed to oversee and coordinate the ongoing development of the exhibition following opening and onto the collaborations with stakeholders, audiences etc. (Black 2012: 244). This will contribute to the balance of capital and revenue spend, although I believe it is difficult to spend project funding on anything other than 'new' materials and roles, rather than the 'business as usual' team. Having this role is important and the necessity to have someone with the prior knowledge and investment is needed to create an ongoing relationship of the gallery with the audiences and communities that will use it. It is clear from the interviews that common motivation, purpose and ownership of the project is necessary for the project to move forward.

The 'Transforming the IWM London' project was run as a programme with a number of strands of work, each with their own Programme Director and an external Project Manager supported them, and was seen by the Museum senior management as essential in the development, accuracy and delivery of the project (IWM 2: 10). This was, however, contrasted with the lack of reference to this role in the interviews. However, this may show that the museum recognises the need for a combination of internal project management ability and external expertise, with relevant skills brought in to work as a collective.

### **People and Projects: purpose and process**

The interviews collectively illustrated how the project management approach itself was not the most frequently referred to part, but the reaction of the people involved was. People with common and collective purpose make projects go well. Here it is interesting to see how projects are judged. By the final product or the process and journey to get there? Ideally, it should be both. Organisations that go through changes and use project management to do so, often require a period of engagement and wider consultation before a project can go ahead, and certainly in order for it to be successful and have the appropriate goals in mind. This is an important stage of how we judge the quality of a project and whether it is successful or not. Project management outlines the three main criteria against which a successful project should be judged. These include cost, time and quality (Lord, Dexter Lord and Martin 2012: 595). All three need to be met in order for the project to be seen as a success. The 'Transforming IWM London' project focussed its success criteria on visitor focussed

aspects (experience, numbers, range) and peer recognition, commercial ability and sustainability (IWM 2: 3). The spread of criteria includes recognition from stakeholders and also the financial capabilities of the museum going forward, all of which was explored in my fieldwork.

Moira Stevenson wrote about the expansion of the Manchester Art Gallery and referred to the initial part of the process which was defining the mission, objectives and purpose of the new gallery, and, therefore, the project. In this context, the museum looked at what these would be by involving the staff in the museum from various departments in initial workshops. By looking at the current situation, it is possible to create a baseline against which the 'success factors' of the project can be judged (MacLeod 2005: 66). For this particular project, success factors included the number of visitors to the gallery (quantities) and comments from qualitative research questions such as what would make visitors come more often and also create a better experience overall. In addition to the needs of the audiences, the physical requirements for the project were also clearly outlined in order to make the gallery fit for purpose in the wider cultural and historical aspects of Manchester, and the care of the collections (MacLeod 2005: 76).

The planning and management of the Manchester Art Gallery project can be considered to be successful, due to the good qualitative and quantities reviews that indicated that they reached their goals of increased audiences and also have exceeded their visitor number targets by 30%. But they also use these targets to judge how to continue to improve, for example, looking at the areas where they can continue to improve and build on their success. Success factors are marked against what the project objectives were and if they were met, as well as whether the project was delivered on time and on budget (Field & Keller 1998: 70). The project summary also mentioned working in a more commercially aware manner, which shows that the organisation was aware of the financial environment in which it was operating (MacLeod 2005: 76). What is also interesting is the reference to the influence of funding bodies and government agendas and how this is being factored into the future plans of the gallery. This shows that the organisation is recognising the importance of



their continuity and relevance to the communities they are part of and serve. This may be something that particular types of museum, like local authority for example, are more attuned to, due to the funding streams they work from and assess their relevance and cost effectiveness. Project management processes are there to help the project manager constantly assess the reconciliation of cost-quality-time. Project management can often feel like it is in competition with standard operations of the organisation, and often there have to be projects and operational trade-offs (Pettinger 2012: 240). This is not something that the project manager can decide on their own and this is where people and negotiating skills need to come together. There is no point pushing for the project to succeed and be on time and on budget, if the core aims of the operational aspects of the organisation are behind and do not deliver. In most organisations, this would mean impact on customer relations and financial implications too. Here, critical paths for projects can be used to identify those milestone points where these areas come together. A cost-benefit analysis is often used to identify both the financial and non-financial aspects of whether a particular path is the correct one. It is widely used in the public sector and commercial projects and aims to look at not only the financial implications, but also the wider social benefits of particular actions before making a decision (Pettinger 2012:273). These analyses are important not only for the success of a project, but also the process by which decisions are made. Solutions cannot be identified until the issue has been properly identified and assessed and then defined.

In museum projects, the considerations of a successful project are similar to the Manchester example, where the main stakeholders and collections are the main criteria against which the project success is judged. It is possible to baseline the visitor responses and numbers before a redevelopment, and then carry out the same survey after completion and see what difference there is. This is a very common and widely accepted methodology to measure the impact and success of a redevelopment project. The issue is that the visitor response will not give the opinion of the museum staff and those who worked on the project. During major capital projects, there are concurrent changes to the structure, role and culture of the museum as an organisation. If a museum capital project is run on time and on budget in its

construction, but in order to do so is actually failing in its purpose of creating an exhibition which engages the visitors and communicates the collections in a new way, then the question must be asked if the project should be considered a success overall. It would be the internal staff who would know that the conservation conditions or if the display case quality is up to standard, but this may not be visible to the visitor. If the criteria against which the project is being judged is the visitor response only, then the issues may not be known and seen to those evaluating it. It is important to consider how far museum project methods of assessing success are relevant for museums and galleries, which is something I explored in my fieldwork.

Each organisation has its own culture, structure and idiosyncrasies, and museums in particular come with a significant amount of history or accompanying long-term behaviours and processes. Museum management and project management could almost be a subset of organisation management and project management as a discipline. The history of museums and the roles that they play in a non-profit environment and by serving multiple roles as keepers and preservers of collections, as well as communicators and representation of multiple audiences, means that their reaction to the changes in their environments are very particular. This does not mean that they have no concept of management or project management, but it does mean that the project management process and team involved need to appreciate the multiple stakeholders that the team will need to address, reach and communicate with. Museums throughout their history have had roles which are beyond a standard remit. As Black says, their responsibilities go beyond their public face (Black 2012: 45). The accountability of non-profit organisations is changing according to Weil (Sandell & Janes 2007: 43). Whereas most businesses can be judged on their financial statements, non-profit organisations struggle to have such immediate indicators for success, but should have 'action goals' (Drucker 2006: 3). Ultimately, the institution needs to be able to state how it is entitled to be allocated the public funding and resources that are entrusted to it, and that it has used what it has asked for in an appropriate way and refers to this as 'positive accountability' (Sandell & Janes 2007: 44). Once funding sources decline or completely stop, museums often look for new sources, including the public themselves and have to learn how to define themselves as 'worth it' and also

engage with the public and turn 'engagement into a funding stream' (Black 2012: 4). Drucker describes how non-profits justify themselves by saying they serve a public need, however, this is no longer enough, and they are expected to create a 'want' (Drucker 2006: 108). When using donations and public funds, the justification of the activity of the museum becomes more widely assessed and judged. Now there are more stakeholders to answer to and the focus may even change depending on the source of the funds. In the end, as Gwyn Miles, Director of Major Projects at the V&A 1984-2005 says, 'museums have to shift and change: the 21<sup>st</sup> century museum is defined by the expectations of visitors' (V&A 1: 15). There are many criteria against which a museum project is judged, but before each project, they should be scoped out and agreed and checked against throughout the project itself to ensure everyone is moving in the right direction. It is my experience that construction and cost can overtake all conversations and the rest of the project is pressured to fall in line.

### **Existing Project Management Methodologies**

The methodological approach for projects can vary, as discussed below. However, there is a gap in the methodologies for a context-based and responsive approach. As shown in the case studies, there is usually a combination of both internal and external members involved in the project. This means that it would be better to develop a project management methodology that can be flexible and considerate of the environment and the creative and open features that relate to organisations like museums. Project management has existed for some time, but its increased recognition as a profession is relatively more recent. The Project Management Institute (PMI) and Association of Project Management (APM) which have brought together best practice, increased visibility and recognised qualifications and certification for project management. The role of a project manager and project management itself varies greatly and depends on its usage and the environment in which it is being used. The projects I have managed, for example, have included large-scale building projects where I am in charge of large budgets, internal teams and external contractors to deliver one new gallery, or a project could be smaller, but still involve multiple stakeholders within and outside of the museum. The culture of the organisation affects how a project is structured and carried out (Berkun 2005: 7) and

museum organisations will determine how they approach projects and what methodology they will use. Project management within in a museum environment has changed over the last few decades and is gradually more accepted and clearly advertised as a position and role (Ashmolean 33).

The field of project management is still developing and learning from other disciplines. Project management in museums requires its own approach and methodology (Walhimer 2015: 104) due to its specific needs, mission and cultures. Many of the techniques we have developed have come from the last century, and are focussed on industries that are more direct than is needed for projects in museums. For the construction of a museum building, these project management approaches work well and are appropriate. However, when the building and the exhibition design come together, then there are new variables in the project which are museum staff and processes that are typically not involved in these types of projects (Walhimer 2015: 105). In the late 19<sup>th</sup> century, Henry Gantt developed a system called the ‘task and bonus system’ which was implemented at Bethlehem Steel, where he was working at the time (Mingus 2001: 5). It was also here that he broke down a process into a series of tasks, working out estimates on them and tracking progress against them. In doing so, he created a new type of chart to track progress. These are still used today in the form of ‘Gantt charts’ (Berkun 2005: 3). In the 20<sup>th</sup> century, further developments in project management were meant to help control projects and ensure that they would not go off schedule. Other project management methodologies that are also used in museums include Critical Chain Project Management (CCPM); and Program Evaluation Review Technique (PERT), which can also be used in conjunction with Critical Path Management (CPM). In the 1950s, two types of project management tools were developed and used by the United States Navy: Program Evaluation Review Technique (PERT) and CPM– both of which are statistical techniques for measuring and forecasting progress, which is particularly helpful in time constrained projects. CPM is a network diagramming and scheduling technique, which involves creating a diagram based on the interrelationship between project tasks and the different routes to get to completion, including the quickest one. CPM has been mostly replaced by network-programming portion (Mingus 2001: 5).

PERT is a technique for making better estimates by trying to minimise risks by averaging out high, medium and low estimates for work. One of the ways this can be shown is in a PERT chart network diagram which will then be used towards a project schedule. This technique was developed in the 1950s by the United States Navy as a way to estimate more accurately the development of one of their submarines (Mingus 2001: 126). This precise way of estimating for a schedule is common in engineering and mechanical process related environments where such quantification is more regular. The diagram is made up of nodes, beginning with the start node and any dependencies are drawn with arrows and additional nodes drawn until all the tasks are connected, and then finally a finish node at the end. Practically, however, the chart can seem to slightly misrepresent the true route of the end-to-end process when there is more than one dependency when completing a task. It means that a 'dummy' activity line needs to be added back to it to represent it (Mingus 2001: 127).

As mentioned, Critical Path Method (CPM) is often used in conjunction with PERT, which is another networking technique and is considered to have advantages over PERT. The critical path, in project management terminology, means the shortest sequence of work that can complete the project (Berkun 2005: 261). There are other paths which are not the critical ones, as they have 'float' or 'slack' in them, which means if there are unexpected occurrences during the process, then it can be accommodated here. Completing a critical path analysis and creating a network flowchart puts all the milestones together and indicates which are dependent on each other, much like PERT, but also shows the potential bottlenecks where multiple items are dependent on one, for example. These pinch points will also mean that if there is a delay in the main dependency, then there will be major impact on the multiple tasks reliant on its completion. Critical path analysis allows the project manager to assess this before the project progresses too far, so that the risk of impact can be managed. Having a clear idea of what the critical path, and often paths, is means that the project manager can keep the team focussed in order to deliver efficiently and in good time. Both create a network diagram from which a schedule can be drawn together. A Gantt chart is often the way in which this is shown and used as a planning, tracking and also a communication tool (Field & Keller 1998: 203). There is software available that

combines the path, the dependencies and also tracks the progress as guided by the input of the project manager. These are very structured and methodical approaches and methodologies which can be used in all sizes of projects. Museum capital projects need this discipline and monitoring, but quite often with major refurbishments, there are contractors who carry out the building work, sometimes there are cultural design and project management consultants or positions too. However, how much of the project management is carried out by staff, new or existing, within the museum varies greatly. Therefore, the museum organisation being able to keep the project management skill set, project knowledge and experience varies too.

As shown by the previous examples, these project management methodologies developed from construction and in larger organisations. There are also project management techniques that developed through IT and engineering environments. PRINCE2 (PRojects IN Controlled Environments) in its earlier existences, was developed in the 1980s and continues to be developed and updated today. Originally developed from local authority IT projects, PRINCE2 is now a widely recognised 'generic' project management qualification. Dependent on which environment you work in, there are several regularly used project management practices. PRINCE2 is the most common and is widely used in UK government and also in the private sector as well as internationally. Many museum project management jobs currently advertised include a PRINCE2 qualification as an essential criterion. Originally developed for government information and communication systems projects, PRINCE2 is a framework and combination of structure and procedures that enable a project manager to set-up, plan, manage and deliver projects. PRINCE2 works on the principle that everyone involved on the project is trained at least up to the foundation level of the programme and methods. This is to ensure that everyone understands the principles and processes. However, it is very rare that all museum staff will be trained up to this level and so PRINCE2 cannot be applied in its full extent. There is distinct paperwork involved in all these stages (a minimum of 26 types of forms for recording, monitoring and communicating [PRINCE2 2010]) and for that reason can be seen as labour-heavy. It can also mean that if the project manager is not completely up to date, then the documents may be confusing. For this reason, PRINCE2 is not suitable for museum

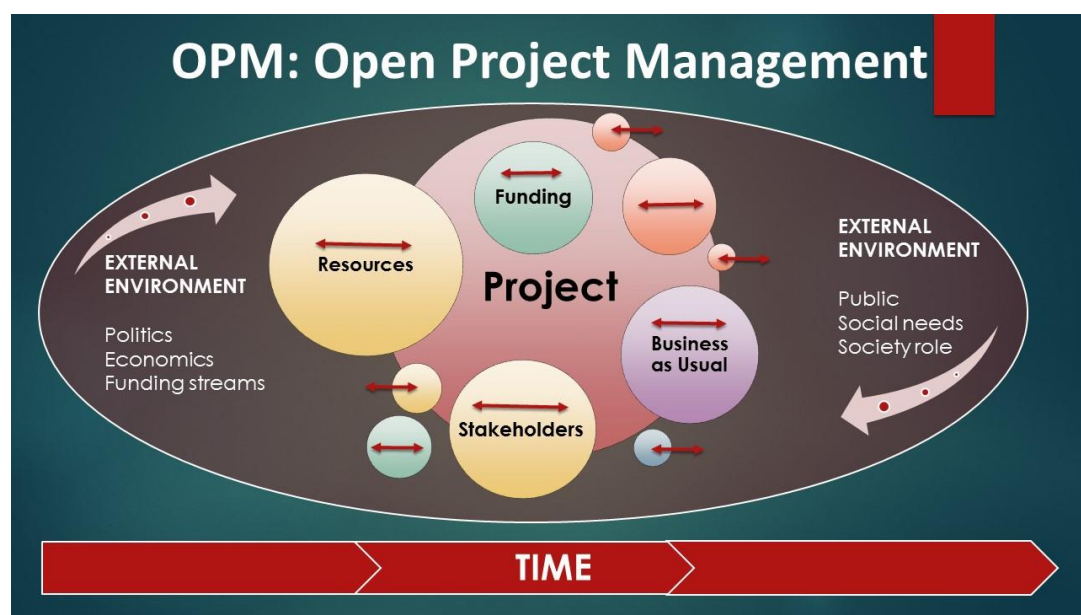
projects, unless the museum makes the decision to all be trained in the methodology. However, I have seen some elements of similar project management paperwork regularly included in other projects, such as the Project Initiation Document (PID), or the Risk, Assumption, Issue and Dependency (RAID) log (PRINCE2 2010). These are usually used as part of an 'application' stage for a project, when the project manager is asked to complete this in order to outline clearly what they will do with the funding, the guiding principles and essentially outline the project in clear terms and expectations (Lock 2013: 124).

Critical Chain Project Management (CCPM) focusses on the resources when planning and managing a project, which includes anything needed for the project such as people, space or materials etc.. This is looked at for particular project tasks and is different from the PERT and CPM methodologies, which are more traditionally used in many construction, engineering etc. environments, as these look at task timeframes and are more rigid on the end-to-end process. It was developed relatively recently (1997) compared to PERT and CPM (by the 1950s) and is related to the theory of constraint, which identifies each project task and its variance, but also that all the tasks interrelate and are connected (Leach 2014: 51). The major push for this type of project management methodology, instead of PERT and CPM, is that it can make projects much more efficient and make savings in time and money. Unlike PERT and CPM, CCPM works on the idea that instead of rigid scheduling, the idea is that the resources are scheduled at varying times and across different tasks in order to complete the project. It has theoretical underpinnings that come out of theory of constraint, but will such a complicated approach apply to a diverse organisation like a museum. The role titles include in addition to a Project Manager, a 'Task Manager, Resource Manager, Master Scheduler, and Senior Manager' (Leach 2014: 212) and the methodological approach does not map easily onto a museum organisation. If the process is too complicated and there cannot be a shared language, approach and common ground, it will be difficult for the project to obtain buy-in from the museum and ultimately be a success. For the museum to make key decisions throughout, their needs to be a shared knowledge area.

Although CCPM addresses issues that come with complex construction projects, the process is more intense than is required for museum projects and would involve creating too many new roles in order to carry out the different processes that are part of it. Where Critical Chain Project Management (CCPM) focusses on the theory of constraint, it means that it always has at least one constraint and restructuring around it and constant monitoring and many team members doing so. The approach of managing the unknown during projects is usually included in risk management. It is noted and will be kept in mind when making further decisions. However, CCPM approach includes 'managing uncertainty', part of the basic project structure and system (Leach 2014: 111). This is already accounted for and included in project risk management, this is part of the overall project system, as a project manager should ensure that they are keeping an overview on the risks (what could happen), assumptions (assumed principles), issues (problems that have happened) and dependencies (linked and interdependent tasks), as well as timeframe and resources.

### **Open Project Management (OPM): new creative and context-based model**

Developing from the more orthodox examples of project management methodology, and examples from the case studies and literature, what is outlined here is the model for a new more flexible, responsive, context-based model for project management for organisations like museums – Open Project Management (OPM).



**Figure 14: Diagram outlining the concept of Open Project Management (OPM)**



## **Principles of OPM**

Organisations need to act as adaptable organisms and move with their environment (Curlee & Gordon 2011: 94). The rigidity and strict frameworks of existing project management theory and practice (such as PRINCE2) highlights that there is a gap in the project management methods used in museums. From the case studies, the type of project management used includes methodologies from construction/industry and IT environments. None of these take into account the often fragile environment in which organisations like museums exist. With funding cuts, changes in priorities and ultimately the roles of non-profit organisations in society, museums in the UK have found themselves in a position to need to react in order to survive. Projects are often opportunities to create change in order to survive drastic influences from the external environments, as stated by Lees and Rayner when 35% of their Grant in Aid funding for the IWM was gradually phased out (Lees 2016 Interview).

OPM works on the basis that in order to manage complex projects such as capital builds within the distinctively open and creative environments of organisations like museums, there needs to be a more flexible and responsive model.

The Timeline elements and linear processes of more orthodox project management methods, as outlined previously in this chapter, are still necessary components of any project. However, what is added to the model in OPM is the focus on relationships and how they ebb and flow at different stages of the project lifecycle. With this, the organisation is able to cope better with the project process and deadlines, while keeping true to its organisational culture and creative processes. This is reflected in the concept diagram (Figure 14) by the expanding and contracting circles of entities that fit within a project.

The 'shape' of OPM also allows for the project to both look in and out from the organisation and project. This means that it is actively participating as part of the open system in which it sits. As shown in the case studies, there are factors in the external environments that can affect organisations and projects. Working proactively to engage and include these changes means that the projects entities are working together in the most effective way, rather than against each other. By being open,

responsive and context-based, OPM is able to recognise surrounding factors and maximise benefit, while minimising risk.

### **Project Planning**

Project planning is an essential part of minimising risk and usually done by specific project roles, rather than the internal museum staff, as shown in some of the case studies. Foakes reflected on the MOSJ refurbishment that there were things that they would do differently if they were to do their project again. The preparation and planning for a project can often be as important as the execution. It most certainly feeds into the execution and can have a significant effect on the success of a project and should not be underestimated. It can also be an opportunity to include the project team and ‘take them with you’ as the project is set up. By involving people in this way, they will see the project more as ‘theirs’ rather than something that has been forced upon them. The project plan in fact comes at the end of the planning process, which looks at all areas based on the needs and wanted outcomes of the project. It can often be referred to as ‘satisfying the client’ (Field & Keller 1998: 165). OPM works with all entities in the open system, rather than trying to control them. Recognising the benefit of the structure and culture within the organisation and how to take them with the project. Mayhew outlined in his interview that the use of internal staff in the project for the planning stages was very important.

“The one thing that the existing staff of the ash could provide was expertise in the collections, which was lodged in the curators. That is not how most project designers work...but I think it produced a better final product.”

(Mayhew 2016 Interview)

In order to put together a project plan, or indeed a project initiation document (PID) as it is referred to in PRINCE2 project management methodology, the project manager needs to focus on specific areas in order to plan effectively. For example, having clear objectives for the project and, therefore, understanding the ‘contract’ between the client and the project team, establishing the resources needed, what structure the team will have, as well as the lines of communication both internally and to the main stakeholders outside of that team, scheduling and monitoring and adjusting the

schedule. All of this needs to be summarised and established in the project plan, which can then be referred to throughout the project in order to ensure that the cost is on target, the timeframe is being met and the quality is as expected too (Field & Keller 1998: 218). Project management methodologies like PRINCE2 have their own extended paperwork and terminology for each stage, which fits an IT and engineering type of environment (Mingus 2001: 103). For creative and non-profit environments where the stakeholders can include community groups, visitors to exhibitions, focus groups of potential future visitors to the museum, it is then much more difficult, and most likely inappropriate, to force such levels and volume of forms and procedures into this process. OPM would include communication documentation for each stage, because it is essential on complex projects and is recognised and necessary for contractors. However, much as Foakes (MOSJ) and Bramwell (Ashmolean) said in their interviews, it is the 'soft skills' and ability to read different groups within the project that makes a good project manager in a museum, and ultimately a good project.

Projects and organisations are in open systems. Where they bring about substantial change, the environment will affect the project. Some of the interviewees, particularly Jones (V&A) saw the project programme as part of the business as usual for the museum, therefore, it was intended that it could be woven into all areas and staff at the museum.

"FuturePlan was incorporated into the daily business of the V&A and anyone that worked in the V&A also worked as part of FuturePlan."

(Jones 2016 Interview)

With major projects and publically funded organisations, there can be issues with conflict of role and remit when capital projects are carried out. For example, the IWM had to request special permission to close from DCMS (IWM 2: 8). This can be very difficult for museums undergoing capital projects, as they need to do physical refurbishment, but also carry out their role for the public, as well as collections care and research. Museums often try to keep as much open as possible, both to fulfil their main operations purposes, but also to keep public interest while they work towards completing the project and often fight to fundraise for it too. The Ashmolean stayed

open for as long as possible, but had to close fully for around 9 months. This still caused some bad feeling with the local communities. The IWM acknowledged in their evaluation that the additional request for 6 month closure was 'difficult' for DCMS due to the constraints of the public funding the museum receives. The V&A has remained partially open while it refurbished over two thirds of the 140 galleries of the museum, and recently opened the £40 million refurbishment of the Exhibition Road entrance. However, this has been done in sequence since 2001 and not across the whole museum in one wave. The aim, according to Martin Roth, was that the museum could follow a plan with a 'clear strategy' but also have 'flexibility to social and economic changes and an incremental and inclusive approach to development' (V&A 1: inside back cover). This is not always possible for all museum capital projects due to physical space and staff resources available. The Ashmolean kept its Egypt and Western Art galleries open to the public, while the other 15,000 objects were prepared for redisplay in the 35 new galleries that were being designed and built. But there are smaller museums, such as the Museum of Oxford, which will need to close its current galleries at some point in order to incorporate them into the new plans.

Some projects that come from within a museum often are led from a direct need to refocus and redesign the museum, both organisationally and physically. This was the case for the Glenbow Museum, as described by Janes (Janes 2013). With the physical refurbishment, the refocus can look directly at what the museum management and team want the museum to be when complete and then work directly towards it. However, there often has to be a balance between what audiences are being included, what physical space is available, and also what funding is available and where this has come from. Funding that comes from a trust or foundation will be for a particular purpose, such as an education facility or welcome room etc. Project management is affected by all of these factors and creates a multi-layered fabric, rather than a linear end-to-end process. Prioritisation and aims will often vary from the start to the end of the project, as the project itself evolves and also the environment in which it exists. For the Ashmolean Museum, the fundraising took a massive hit during the project due to the major financial crash in 2007-8. Fundraising projections had to change and new funding sources be identified, and the original targets for private donors was reduced

as there was less capacity in all areas of giving. This meant also that there had to be some value engineering for the final production, while keeping focussed on the quality of the final museum (Ashmolean 14).

### **Project Management Structure**

To run a project in the most efficient way, the museum should have a project management structure that utilises all the best skills of the existing museum staff and brings in necessary external skills where needed. This can be seen on the OPM concept diagram (Figure 14) in the round entities that move in and out dependent on the stage of the project. This can be seen in the V&A example, and also the examples of the IWM and the Ashmolean where they also developed similar internal project management capacity, but not with their own department. The gap between the museum organisation and typical operations, and the needs for the project should be bridged by a flexible-framework, as part of an OPM model, which recognises that the museum and the project operates in an open system through a repeated feedback loop, and movement of resources to suit the workstreams of the capital project. Stevenson outlined how a project management structure was put in place in order to enable the staff to deliver gallery redisplay, which included the development of the content and design of the galleries in parallel with the building project (Macleod 2005: 68). In this case, the project was mostly managed within the existing team in the organisation, with procurement and project management support from an external company. Main tasks were given to the members of the Departmental Management Team (DMT), and the Assistant Director oversaw the co-ordination and delivery of the fit-out. By using in-house staff, it is more likely that the project memory continues with the organisation after the project is completed. The level of engagement and 'buy-in' from the in-house staff will also be more likely to be greater. Although there are many positives to using in-house staff, there are issues such as over-loading staff and consequently under delivering on the business-as-usual workstreams. Again, it goes back to the understanding of what are the regular operations of the organisation, and what outputs are defined for the project (Pettinger 2012: 240).

Managing expectations of existing stakeholders is very important during a project. Relationships are enhanced through good communication, and it is a good thing for an

organisation to communicate well, both from a practical as well as a social and job satisfaction perspective (Berkun 2005: 170), as well as recognising what additional resources and skill sets the museum may need from external additional staff. This was also the case with the IWM London project where they recognised in their evaluation that more regular meetings for decision making as part of the project were needed and would be implemented in future phases, and the 'small, focussed museum team, supported by external expertise' (IWM 2: 11). For the Manchester redevelopment, Stevenson outlined the seven tasks that were overseen by the DMT, including the physical elements of the redisplay and also a focus on the project fundraising and the longer term business plan aspects of the organisation. Once again, the idea to bring the expertise in-house was taken on and a 'Head of Development' role was created as part of the DMT, as well as a 3-year business plan (MacLeod 2005: 73). Here is another example of where a project management structure has an effect on the overall organisation structure and longer term shape of the organisation as it develops to fit its new role.

“Through masterplanning we will develop new kinds of gallery spaces where learning is at the centre of the visitor experience.” (IWM 1)

What this quotation shows is that, in addition to the new role and focus, the museum is developing the physical site in response to the needs of their collections (and narratives of conflict and history), as well as particular focus on their audiences. This correlates with the response of Roger Mann (from Designer Company 'Casson and Mann') in his article about the redevelopment, where he discusses a more 'felt' experience and the want and aim to make it more experiential for the visitors (Guardian 2014). This shows how the aims of museum capital projects are far beyond just the physical, and again illustrates how an OPM approach which recognises the external environmental influences of the organisation in an open system.

### **Project Management Team: creating a flexible framework**

Based on the responses from the interviews and the case studies, it is clear that what is needed in a new type of project management approach is a flexible framework that enables the project to reach to internal and external influences more effectively. The

National Museum examples recognised this first and kept project management expertise in the museum organisation in order to prepare for the forthcoming projects and flex with the needs of the organisation. A project team structure is an important way to facilitate this. It can be considered to be superimposed onto an organisational structure, which usually includes several members of the organisation on the project team as well, all working together on the project (Lock 2013: 146).

The project management team can be thought of as the project manager and the team that is led by them. This can include administrators, team leaders and coordinators and anybody that is included in the project. There are also the reporting strands which can, in some project management methodology, such as PRINCE2, include a 'Project Executive' or the 'Project Sponsor' and a 'Project Board' (Mingus 2001: 29). Within creative environments and open systems, this team needs to respond to the needs of the project, the capabilities and creative development needed from the team and the influences of the environment in which the organisation sits. Identifying these roles is important as it shows where responsibility lies and authorisation can be developed. Active and careful management of all project collaborators and stakeholders is vital to a project being successful. It may also be the case that other roles will emerge and develop as a project moves on, so it is always worthwhile to establish a good framework for working with all partners from the outset. It is common that projects change during their lifecycle, so being able to react, plan and proceed with the best path is important. The levels of responsibility are used more on larger projects, and are certainly relevant to museum capital projects, where there are multiple areas coming together to work on several interlinked work streams (construction, design, exhibition content development etc.) and certainly these are a requirement for to larger funding bodies.

As shown in the case studies, there are different ways in which the project examples used the role of a Project Manager. Some began with it all external and then brought it in, others made a combination. It was touched on by all interviewees at some point in their interviews that project management was best kept within the museum, because knowledge of the specific organisation is more important than a perfect linear project management process. The project manager role can be someone from within the

museum organisation, if they have experience in project management, and they should be relieved of a significant amount, if not all, other non-project duties (Lord, Dexter Lord and Martin 2012: 36). It is the key role that sits within the centre of the project and coordinates and collates the information and progress, and monitors the budget, workstreams, reports, and concludes the project. Within museum organisations, the title is used often, along with 'project coordinator' etc. which highlights the temporary nature of the role and also the specific task they are assigned to. Some museum studies literature refers to the individual who can be the project manager, although some smaller projects could be managed by internal 'operations' staff, for larger capital projects, a project manager from outside the museum (Lord and Piacente 2014: 238). They should have experience in design and construction and be trained in project management techniques (Lord, Dexter Lord and Martin 2012: 542), however, this needs to be a careful balance of project management skills and ability to understand the museum structure and culture that they are working with. Often, there can be a clash of cultures where an external project management produces Gantt charts and timelines, without taking the specific needs and mission of the museum organisation into consideration and accommodating appropriately for it.

The project manager role can be temporary, although in some cases, it can be made more stable and become core to the museum environment. For example, if the project team is tasked with creating a new exhibition in the museum, the project team will need some of the expertise of the museum departments, such as curatorial, conservation and facilitation. This will be combined with both additional staff that are brought in to join the team, such as project managers, cost analysis, as well as additional team members to help with the volume of work, such as object processing. This works well with an adhocracy organisation structure (Fopp 2001: 142) and works in a matrix pattern, rather than a hierarchical one. The team is led by the project manager, who leads the team and project to completion. The team members will work together on the project, but there will be 'business as usual' work for those members of staff who are both project team members and part of the original organisation. Even though these members will have their existing workloads adjusted in order to



accommodate the project work, these members of the team can often feel pulled in different directions and have a different perspective to the other team members who have been brought in for the project specifically. But this can be seen as more common in most organisations, where 'projects and operations form the basis of the mainstream activities, and, therefore, profitability of organisations.' (Pettinger 2012: 239). There may be more of an awareness and consideration of the longer-term perspective and understanding of the impact of the project on the organisation afterwards. Although this structure is more bureaucratic, with the lines of reporting not just being hierarchical, it can also be confusing and a conflict of interest, because team members can have two individuals to report to. A clear outline of what is expected by both line managers is important, with this being communicated to the team members as well. With this more open approach to project management within an organisation, the strength of a team is that it has both the internal knowledge of the organisation, but also the new perspective and skill sets of new team members.

The role of certain staff in a museum can mean that it is a more difficult transition from the normal day-to-day work onto the project work. For example, a curator is used to working to deadlines, completing projects, but can quite often find the transition from 'curator' to 'project curator' a difficult one (Dexter Lord & Lord 2001: 9). Using the restructure at the Victoria and Albert Museum (V&A) in 1989 as a case study, Murdoch highlights how the role of a curator has gradually been broken down and, in some cases, reallocated to other staff and new departments created. These include collections management and documentation, conservation and research. In order to support curators in their role, museums have taken aspects of what was considered 'curation' and passed it onto other professional staff members. In addition, the V&A enabled the curators to be able to transfer into the Research Department when they were on a final stage of a project in order to concentrate on it fully and ensure completion. With the OPM approach, these transitions within an organisation can be accounted for and developed as part of the process, while still considering the personalities and culture of the organisation.

### **Role and personality**

Leadership should not be underestimated in the overall success of projects and change

in organisations, and the leaders of the museum need to lead and inspire the staff, but also the many stakeholders of the museum too (Lord, Dexter Lord and Martin 2012: 39). In OPM, and I would argue for all project management methodology, it is very important to have strong and clear leadership, so that there is a common-goal approach to the project. Leadership was a very important feature in the interviews as the interviewees reflected on their roles and others in their projects. People with common purpose is essential for a good organisation, but also for projects. Kotter explains that large renewal projects often begin with one or two people, but it is important that the leadership coalition grows (Sandell & Janes 2007: 23). Leading, rather than managing and people doing it 'because they have to' is always much more effective, but still seen as something that can be linked to personalities and traits. But good management and leadership do go hand in hand, and as Kotter says, if the leadership group grows the rest of the team 'buy in' to the project. Ultimately the changes that are planned and carried out need to be continued, owned and the organisation still goes on developing. It is also important that the leadership coalition is made up of a mixture of team members, so that it can spread widely the sense of ownership and urgency of the tasks in the project (Sandell & Janes 2007: 23).

OPM recognises that most organisations go through various levels of change regularly, and can often include the same groups of staff and contractors. It can also be the case that an institutional memory is built up and become almost an 'education' of how the organisation can work in a project management environment. As discussed already, the case studies show examples of museums that have taken more of the project management role into the organisation and with internal staff, such as the V&A with FuturePlan and the IWM London redevelopment. Mark Jones described how FuturePlan changed the culture of the organisation to one 'in which everyone accepted that the reworking of the museum was something that was part of normal life' (V&A 1: 8). The museum learns from the positives and negatives of each experience and, in theory, refines the process to be more efficient and effective each time. By developing an organisation in this way, the staff working within it are also able to regroup quickly and change according to the need.

### **Project Activity and Budget: monitoring, recording and re-aligning**

Budgeting for the activity is important in order to scope what is feasible within the project remit, and it is necessary to consult it when the project activity and remit vary or change. Estimating the costs to prepare for the budget and subsequent spending is vital (Field & Keller 1998: 92). Understanding cash-flow and the need to 'drawdown' funds from funders at regular periods is also an important aspect of project management which involves reporting on expenditure and activity and showing how the project has fit the original remit in schedule and budget. There are different ways of looking at budgets which include evaluating every cost, distributing costs to other sections to manage and keeping an eye on entities and potential variance (Pettinger 2012: 264). In order for this to map onto the creative development process, the responsive principles of OPM means that a project can take this all into consideration through a flexible framework within the recognised parameters in that environment.

For capital projects, the budget can often be stretched by activities that can often feel necessary and, therefore, a legitimate reason to go over budget. Many organisations cannot accommodate the extra costs and it is then the items towards the end of the project that can feel pushed and stretched, such as design and installation. This can also be said for the time allocated to particular dependencies, which means many capital projects run over schedule, not only extending the timeframe but also increasing the original estimated budget. Cost-benefit analysis is an important way of weighing up decisions related to change and ultimately the cost versus the benefit to the project overall (Pettinger 2012:273). Fopp states that the final budget should not be set in concrete (Fopp 1997: 115) but in order for the project to be completed at all, there needs to be enough money. The Museum of Oxford refurbishment has a set budget and matched fundraising targets, so the margins are close. Many trusts and foundations give funds retrospectively. However, the fact that this museum, like the Ashmolean, is under a larger organisation, means that the issue of cash flow is not as immediate with their support. Financial control is essential for a good project and for the organisation to survive. As shown by Bramwell (Ashmolean) in his interview, the timeframe for a capital project can mean that certain activities are pressured in order to accommodate the extra needs of the construction. However, it is often difficult to

mitigate this when construction is involved, because there are often unexpected items that are fundamental to a building project and this can also link with security and quality aspects of a build. It is also not possible to change contractors easily in the middle of a project, unless there are major problems. Time management and control of sub-contractors within a project can affect not only the timeframe but also the budget and needs strong management and monitoring from the project side (Fopp 1997: 40). In addition to this, having an understanding of the organisational culture and the open system it is operating in is an important part of OPM.

### **Timelines, Communication, and Managing Risk**

Managing a project means dealing with people, resources, goals, but it is also important to keep in mind and monitor the changing environment in which the project exists and operates (Hopkin 2012: 19). The OPM model would enable the project to manage risk and accommodate with the ebb and flow of relevant entities in and out of the project, as shown by the arrows in the concept diagram (Figure 14). A risk is something that could go wrong and affect the project, but has not happened yet. An assumption is when something is assumed, such as the stability of a funding source, or that a contractor will be finished by a certain time. It is good to monitor these so that you can keep track that they do not turn into issues. An issue is something that has gone wrong during the project and needs to be dealt with. Dependencies are tasks that are dependent on each other, and have a dependent relationship.

When carrying out any project, there are always risks and it is important to identify, analyse and manage them. Risk management is something that is involved in every project and is assessed at the project initiation stage, monitored throughout and adjustments made in order to accommodate and mediate the impact risks may have on the outcomes and deliverability of the project (Mingus 2001: 163). There are several types of risks, including hazard, control or opportunity and the likelihood and magnitude of the risk and by identifying the type of risk, the project manager can then develop and take appropriate action. Monitoring the risks is very important and creating and maintaining a RAID log can be an effective way of doing this, which is typical in most types of more orthodox project management methodologies. This should be part of OPM as well, as it is a record of the collective understanding of what

risks are involved and how far to push the project and the organisation. Registering risk means that it can be monitored and the project path adjusted in order to accommodate the action required. The reaction, new activity and mitigation of the risk is important not only for the delivery of the project, but also the morale of the project team. The risk register can take many formats but overall, the common factors are planning for and attempting to ease any risks that may come about (Hopkin 2012: 91). With effective risk evaluation and monitoring, the risk can be managed or even avoided, which will ensure that the project is less likely to fail (Berkun 2005: 73). Risk can be looked at in basic terms and a 'one size fits all' system added to all projects. In museums, the environment is very diverse and so the end 'product' cannot be a 'one size fits all' and certainly the project journey and process can be affected by a great range of risks along the way. Funding sources and fundraising can be an area of great risk, as shown by the funding collapse in 2008. The outcomes for some projects are difficult to mitigate, as some projects have success criteria such as increased information learning, or increasing and encouraging community cohesion and acceptance. In order to evaluate, measure and evidence the impact the project has on these areas, there needs to be a considered framework and appropriate evaluation planned, as well as time in which to do it. It cannot be done instantly and would need long-term engagement with the project and following it in order to establish and be successful in these aims.

### **Project Completion and Evaluation**

When the project deliverables have been completed, then the project is nearly over. In order to complete a project, it should be formally closed down and signed off by the project board and the funder. The project manager and team produce a final report, and then circulated to the project board and funders. This should include the final handover of any information or documents to operational staff. Within the principles of OPM, any results and opportunities for the organisation and the environment to learn should be evaluated, shared and woven into further versions of the OPM methodology. This should include any recommendations and learning from the project so that it can be useful for other projects and organisations. Some projects include a completion plan as part of the overall project plan, and this should be reviewed at the

beginning of the project as it would be too late once the end is reached (Mingus 2001: 305). The project completion and evaluation can often be an area that is not done as well as possible, because it has not been costed in appropriately to the project plan.

Reaching the end of a project is both a massive relief and achievement. It is often followed by a 'settling' period. Within a museum organisation, the museum may have been closed for the period of the refurbishment, so the grand reopening can bring a lot of attention, both in new visitors and also in the press and peer environments. The settling-in period can then sometimes leave gaps in what the new 'business as usual' situation is within the institution. Some staff may think that it is good to get 'back to normal' but these capital projects will have wider remits than making the galleries larger and new showcases. The audiences are essential and ultimately the 'customer' and certainly a major stakeholder in all museum gallery projects. But the completion of a project should include the completion of all the original aims and objectives.

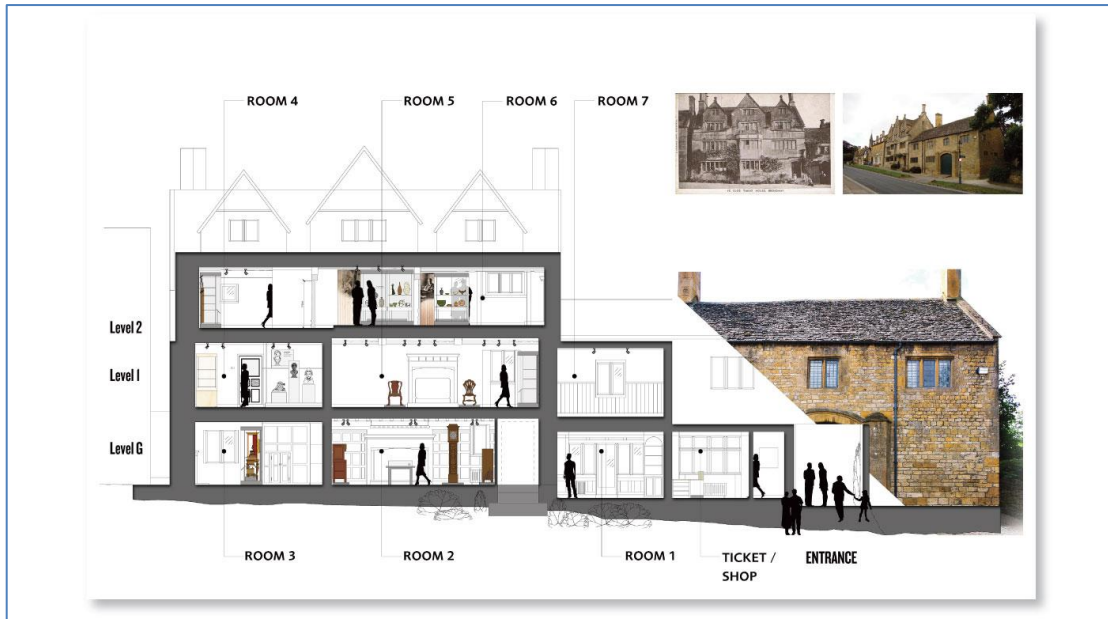
Snagging the construction work is very important and holding the construction companies to account for quality and keeping to specification can be difficult. Some projects insist on the project management company to do this, rather than managing this in-house. In museums, this can also be done with larger 'packages' of work within the project, such as design. Black goes as far as to outline very clearly how museums can work effectively with designers and more specifically external design companies.

As a result of the increase in museum redevelopments, there are larger commercial industries now that focus on museum design, project management, cultural management etc. Black states that he feels museum design can be transformative, but indeed that he would like to see a return to simpler and more cost effective exhibitions. The creation of new galleries, including their physical refurbishment, is a mass collaboration and involves museum professionals and also contractors with external skill sets that arguably are not always in a museum staff skillset. Designers and museum staff work together creating exhibitions, as well as interpretation and learning specialists often. Black outlines how the pressures of timeline and budget from the designers can make this creative process strained (Black 2012: 246). I think that this can be said also for any role that adds a finite budget and timeframe to the museum staff and this is what the project manager in a museum does continuously.

While the need for full engagement and development of ideas is necessary, it should be built into a project timeframe and plan, but then still adhered to. Black states that the museum should keep full control over the process, which is what project managers are often hired to do, and can be difficult to do if the control of that part of the budget and timeframe is given to the external design company (Black 2012: 246). Completing a project on time and budget are very important criteria and a project can be judged immediately on these aspects, however, non-profit and more specifically museums require more ways in which the success can be measured and shown, such as the strength of the content in the exhibition, the range of interpretations of the collections and the engagement of the museum in the redevelopment and its community reach.

Following the project completion, a post-project analysis or review, with the stakeholders, means that the true value and 'lessons learned', successes, any issues and failures can be identified. It is also the opportunity to reassess whether the aims and objectives of the project were met within the timescales and on budget (Mingus 2001: 319). OPM works on a responsive basis, and that includes reflecting after the project and including lessons learned into the ongoing versions of the model.

Evaluation should be a natural part throughout the whole process of the project, where risks and issues are assessed and evaluated before a decision is made on a way forward. It is a way in which one can determine the causes and possible ways forward when there are deviations from the 'expected planned performance' (Fopp 1997: 13). Fopp describes it as an excellent way in which the team can see how well they are doing, and where they can improve, through regular evaluation. (Fopp 1997: 104). Writing reports are not the only way to evaluate your project and using focus groups, surveys given to the project team and also the client, as well as asking for reference summaries can all be used to gather information and 'lessons learned' ready for the next project (Mingus 2001: 327). Ultimately, project managers and related companies are judged on their portfolio and also the satisfaction of the previous clients.



**Figure 15: Ashmolean Museum Broadway (Worcestershire) – working with a designer, we incorporated the new display narratives into the listed building, at the same time as the physical refurbishment of the building.**

**(Victoria McGuinness - Ashmolean Museum/Bjung Kim – Ashmolean Design Team)**

## Conclusion

OPM is based on the evidence and reflective responses from the interviews, as part of the case studies in this thesis. As a model, OPM is a combination of processes and also a responsive and context-based project management methodology. Following the more orthodox types of project management that have developed from the construction and IT industries, OPM weaves a layer of flexibility and continuity that is more appropriate for the organisational cultures of museums and other similar institutions, as well as the open systems they operate in.

Project management theories and methodologies vary dependent on their original source and place of creation and development. For example, organisation theory relates to the social science discipline of organisations, group dynamics and how human practice affects areas such as management. The theory looks at how humans are mutually dependent on each other, with interaction, cooperation and exchanges. By understanding organisational behaviour, it is considered possible to improve



organisational performance. With reference to management theories, organisational theory is one of the most relevant in my current research. By taking into consideration the ideas of human relations studies, organisation culture and development (Crowther and Green 2004: 152) the organisational theory approach considers how management and those being managed are affected and can be effected by change. The main difference between museums and common 'project management environments' such as IT, construction and engineering are the organisations themselves. By looking at the organisation structure and culture before moving into a project, we can better understand why people react as they do when put in this situation. The people that get involved in museums are different in themselves – their motivation for working in museums is quite often not financially motivated, but by interest and passion. It is widely recognised that wages in museums are low and that funding for positions is insecure, yet museum work is still highly sought-after and advertised positions have many highly qualified applicants.

“the employees of a museum...are a team of cooperating friends, working together in mutual dedication to public service” (Burcaw 1997: 51)

There have been huge developments in museums and the study of museums, which is improving conditions and respect in the profession and its recognition. However, there are still issues with culture and practice in that although people may feel they are there for the greater good, there are far fewer positions available than applicants and many of these are very short-term contracts. This is particularly important to take into consideration when applying project management theory and practice in these environments, as it creates sensitivities for those on short-term contracts and also their motivation and commitment to the projects. The incentive is often different for museum staff, as opposed to other staff in projects, to work in museums and also what they would consider 'benefits' for working in such a structured project environment. Therefore, the idea that projects in museums work in both open systems (affected by external influences), as well as being hugely affected by organisation theory is clearly relevant in museum project management (Fopp 1997: 21).

With this current research into management theory, it is clear that certain aspects are very pertinent to the museum environment and can be applied on museum projects. The flexible approach of OPM and understanding that no two projects will run the same way is important in a museum environment. The individuals that work in museums can often prove to be of huge benefit to the project team when times are tough or the unexpected happens. Equally, when a fresh and eager approach is needed, project teams can often provide the new ideas and alternative options in order to reach the same original goal.

Ultimately, there are a multitude of project management methodologies and principles which have developed substantially over the last century, and it is important to know and recognise the levels of complexity inherent to each project as a result of the project itself, the combination of stakeholders and particularly the type of organisation and environment. Pettinger says correctly that there is no absolute set of rules and approaches that will fit all projects. This is because the overall combination of circumstances will vary for each project. There can even be more variety between projects in the same type of environment (Pettinger 2012: 255). Organisation theories have developed over the last few decades and began by looking at making organisations more efficient so as to make more profit and work more effectively, then it was recognised that they could also use these theories to look into the human aspect of this and in fact the importance of humans and satisfaction within the organisation and being more efficient.

There are no project management theories as such, and project management has been seen and viewed as processes and methodologies. The human aspect of projects is considered in processes when there are potential blockages to projects being completed and they need to be adjusted. Project management methodologies focus on practise and methodologies and only when it comes to leadership theories does the human element become considered. Most museums come from the point that they are looking at being human, which involves having an emotional reason and motivation to be part of something, which is more important than high pay. OPM recognises by putting a focus on the creative and responsive aspect of the project management model, rather than forcing a process that does not fit.

## Chapter 7

### Open Project Management: conclusions

This thesis has explored how different types of museums use project management in capital projects, and whether existing project management theory and practice are fit for museums. In doing so, it has provided an analysis of how museum organisations react, develop, and respond during capital projects. It has demonstrated that, along with an appropriate project approach, what is key to museum projects are the people that work in them collectively as an organisation, and come together through common purpose to make projects happen. As this thesis has shown, there is an opportunity to learn and build on existing knowledge of museum, organisation, and project management theory and practice by creating a common-goal, flexible-framework approach to open project management (OPM). The context-based project management methodology has been created to manage complex projects such as capital builds within the distinctively open and creative environments of organisations such as museums. This concept of this type of project management is more that it is more situated and responsive to the organisation's environment. Orthodox models of project management tools cited in literature and cases studies shows that a more flexible-framework is needed for creative organisations.

Using literature based on organisation theories, project management, leadership and motivation theories, and documentation related to museum capital projects, I explored how these areas relate and speak to the specific organisation type of the museum. To address the research questions, there were also several sub-questions that came out following an initial literature review and assessment of potential fieldwork in order to take into account the broader environment of museums.

In order to investigate these questions, the structure of this thesis involved three main areas. The first was the fieldwork research findings and discussion. The second, organisational theories of culture and structure, exploring the relationship of museums to these areas and a theoretical context for the thesis. The third looked at

project management theory and practice, including museum examples. Each one took the argument forward that in order for project management to be successful in a museum, it needs to take the organisation culture, structure and type into consideration, as well as the fact that museum organisations are made up of people, not just collections, who enable a project to happen. Therefore, a flexible-framework approach to open project management (OPM) is the best approach for museum capital projects.

### **Contribution to Knowledge**

The relationships between museums, museum projects, and museum project management are complex and varied. It is thus vital that a theoretically based practical approach for museum capital projects be developed in the future, as my analysis of both theory and practical experience has indicated. This thesis contributes to the area of research of museum projects through theoretical study in the areas of organisation and project management, combined with the practical experience of museum professionals. Using examples of museum capital projects, I have analysed how museums act and operate by type, and also how the changes in the environment have influenced museums and their projects. By investigating how museums react and respond as organisations during change, specifically museum capital projects, this thesis has shown that there are particular areas of consideration for museums that should be included in an overall project approach, and project management. As discussed in Chapters 3 and 5, the roles in a museum and how they have evolved within the organisation could possibly be included into a project management structure. The organisational culture leads the behaviour of the museum as an organisation and also when there is change, for example during a capital project. The most visible part of a museum capital project is the new building or gallery, but what is equally important for a museum to remain relevant and true to the mission of the organisation is to ensure that the museum culture and structure is fit for purpose for the museum's new role. The museum's organisation type and shape are equally important considerations in this too.

The research findings of this thesis can be outlined and explained in five particular areas related to the research questions.

**1. Do capital projects and project management also change the museum as an organisation, and does the project process and approach depend on the type of museum doing it?**

Chapter 5 (Museums and their Environments: structures and response), answered this question through analysis of documents that outline the organisational structure before, during, and after a capital project, and the experiences of senior museum staff, and also my own project management experience. Using several case studies of museum capital projects, it was also possible to explore the motivation of the museum to take on a capital project, the processes and project approach they used to carry it out, and the effect on the museum as an organisation afterwards. What can be concluded from this research is that the museum type influences the motivation to take on substantial museum capital projects. All museums are in open systems and the influences that come from the external environment include political, economic, social, technological, legal and environmental (PESTLE). In smaller local authority or independent types of museum (like the Museum of Oxford and Museum of the Order of St John), capital projects were more likely to be motivated by economic considerations, whereas political and social forces drove capital projects seem to be more prominent in the National Museums although, it is clear that the motivations for all museums are intersectional and levelled, rather than simply one of these areas. At the core of all successful museum projects is the focus on the positive external influences from the environment, such as the museum's audience's needs and how the museum can be redeveloped to better serve them.

A significant finding is that the intentions for many museum capital projects involve changes for the audiences, but the staff needs and organisation shape is not always considered after the project finishes. In changing the museum to better serve their audiences, the museum will often need to change the way it operates internally after the project is completed. This was shown in the Ashmolean structure that grew in size substantially, but struggled to find a shape that could accommodate its new way of operating. None of the museum senior staff made reference to a feeling of 'returning back to normal' after the project, suggesting that their vision was focussed on looking forward. However, it is my experience that this can be the feeling in other areas of a

museum organisation after the project, which suggests that there can be a disconnect between the leadership and senior staff of the museum and the rest of the staff. Understanding what encourages people in the workplace is essential for a people focussed organisation, and many non-profits. The people in a museum need to feel motivated through achievement and fulfilment (Crowther and Green 2004: 39) which is essential to consider in a museum when planning such substantial change through a capital project.

The consideration of the role of project management in museum capital projects was not as visible in the interviews as I had thought at the beginning of this research. The interviewees were senior museum staff and rarely referred to specific project management processes in the interviews, which shows that their focus was on the bigger picture with reference to the project and the process. However, it does also show the disconnect between leadership and project management and that there are areas where project management could be brought together with the organisational shape and culture. Organisational theories have progressed to take into consideration the importance of people and human behaviour, but project management practice is method based, rather than people focussed, which is why there can be this perceived separation at times between the organisation and a project and project management. An important point is that, currently, project management does not take into account the specifics of a museum environment, which includes non-profit, audience and non-commercial primary focus, and educational. What is clear from the research findings is that project management theory is lacking in current literature and approaches and project management methodologies do not take museums and their environments into account. The museum studies literature that does take this into consideration is not always UK focussed and, therefore, does not take into consideration the specific factors in this environment which effect museums. There is a gap in the theoretical framework for museum project management and it should be developed in consideration with museum organisation theory. This is where the consideration of the open project management (OPM) approach would benefit museums planning on undergoing capital projects in the future.

The physical change needs to include consideration for the organisational structure and culture too, in order for it to continue and be sustainable. Sustainability is not only a financial consideration, but is also interlinked with the organisational structure and culture and being fit for its purposes. Projects can make substantial changes and contribute to the organisation becoming more resilient, but the ongoing and knock-on changes to the organisation also need proper consideration and management in order for this to happen. Museums have different shapes and structures, and some sit within much larger organisations, such as a local authority or a university, therefore, this research shows that this can also influence how a museum carries out a capital project and how it benefits the museum as an organisation afterwards.

## **2. Are senior museum staff aware of the organisational change in structure and culture during capital projects?**

This question was drawn out during the fieldwork to challenge my assumption that all museum staff would be aware and participate in some way in the project management process. It was clear that many of the senior staff did not acknowledge it in the way I thought they would. But this would make sense, as the process was managed by project managers (internal and external) and they were considering the bigger picture for the museum and the project. However, when there are major issues in the project, the line of command goes to the senior staff as they hold the role of 'Project Sponsor' as described in Chapter 6 (Open Project Management (OPM): new creative and context-based model). Therefore a more detailed knowledge of the project management process and approach would be more beneficial.

Senior staff reflected more on the physical changes in the interviews and referred to the project in the consideration of the final product rather than just the way it was carried out. Mayhew (Ashmolean) highlighted that 'after the project, we did not recognise how many staff we would continue to need and have'. He described the organisation shape as like an 'iceberg' where we needed a lot more staff behind the scenes to service the new museum. This is why it is important to understand the motivation of why a project is being carried out, because of the ongoing costs and change in culture and operation after the project has been completed. The

organisation needs to be taken through a process alongside the project to prepare them for the new ways once the museum capital project is completed. Mayhew spoke of the work of the Architect and the designers and how they worked with staff to relate the museum to the new building, and the related organisational issues.

“There is still departmental territory...given how much change we were going through, and the difficulties with some engagement across the museum...given the magnitude of the changes – and then to attempt to take on the departmental structure [of the museum] we were still heavily dependent on the Keepers and Assistant Keepers to the project...working on their galleries.”  
(Mayhew 2016 Interview)

### **3. How does the organisational culture affect the museum’s behaviour during a project?**

Museum capital projects involve a significant level of physical change and, through external funding, the projects aim to improve the museum. The existing culture of the museum affects their behaviour during a project, which is why, along with the organisation’s structure and shape, it needs particular consideration as part of the project process and plan. An organisation’s culture is the collective overall experience, accepted beliefs and assumptions, which is also influenced by the wider political, cultural and economic environment in which the organisation exists (Pugh & Hickson 2007: 96). For museums, this can be seen in the mission and role of the museum, but also in the internal behaviour of the museum staff (Fopp 2001: 124). As shown in the interviews, some museums worked in a more collected and connected way, as described by Lees and Rayner at the Imperial War Museum. This was following changes in the structure in preparation for the new funding model and new way of operating as an organisation. In all examples, however, the changes did bring up unforeseen issues, which is natural in all projects. Foakes (MOSJ) spoke intensely on how the capital project was an opportunity for the museum to go through organisational change and restructure to make it fit for purpose and ultimately more sustainable.



As shown in Chapter 4 (Museums as Organisations: culture and behaviour), other conclusions were that the museum organisation culture also can be interrogated by and linked with motivation and leadership theories, which influences how projects are carried out through an organisation. In order for a project to be worked on throughout a museum, it is important to have a shared mission and shared goals, and therefore have a common-goal approach to projects. This is shown in the Museum of the Order of St John example in using their capital project as a catalyst for change. Also, with the Imperial War Museum London in making the new galleries fit for purpose in time for the First World War Centenary in 2014. This ability to 'map' the framework of a project onto a museum organisation structure and shape is important, as is the agility of that framework so it can adapt and respond to the needs and changes of the museum as an organisation.

#### **4. Are museums designing the consequential changes to their organisational structure, or reacting to the changes in their environment?**

The type of museum contributes to why the museum chooses to carry out a capital project, but there are also influences and catalysts for these changes from the environment, which is shown in the case studies and fieldwork. All museums are affected by their environment, and the political and financial influences in it particularly. From a financial perspective, there are the changes in funding streams for museums (IWM 4 & 5) which meant that they need to adjust their activity to fit the new funding levels. Audiences are more visible and their needs are considered more in the development of museums (Latham & Simmons 2014: 114). There are also the opportunities of funding for capital projects from organisations, particularly from the HLF during the period being studied in this thesis (2001-2017) (HLF 2). Museums are trying to develop their shape and structure in order to be more effective in their goals and fit the parameters of their environment. This is shown by the Victoria and Albert Museum which has changed its senior management team regularly in response to the growing needs of FuturePlan, the refocus onto research, and financial and political influences of its external environments.

There is an ongoing discussion of the museum's role, and projects need to be part of

this discussion in order to clearly understand the challenges of transforming museums in the 21<sup>st</sup> century (Black 2012: 4). The ability of museums to attract external funds and keep the same level of government funding came abruptly to an end in the 2007-8 crash. Museums go through transformations, which can include organisational change through leadership style, restructuring and major refurbishments to refresh, renew and revive them as an organisation, both for their stakeholders and their own staff. In order to understand and study how project management fit into this, it is necessary to understand how change is led, engaged and carried through in museums as organisations in a wider context. A mistake that can be made is where the changes are not anchored in the corporation's culture, which is something that is discussed in a previous chapter and supported in the fieldwork examples. By bringing project management into the organisation, as the V&A and the Ashmolean eventually did in varying ways, the process was understood and used more efficiently by the museum. By the organisation institutionalising change into the culture, the change can be owned and carried forward by the institution itself. In order to do this, Kotter suggests that there is time to show the team what the changes are and why they are good for them and the organisation. The leadership needs to follow through and lead by example with the 'new ways' (Sandell & Janes 2007: 29).

## **5. Can project management be made more relevant as a process to museums?**

Project management in museums should have a flexible-framework, as stated in the last chapter in OPM, that incorporates consideration for the culture and behaviour of the museum and recognises that creative organisations operate differently to commercially focussed organisations. From the case studies and interviews, we can see that the smaller museums rely very heavily on external project managers, whereas the larger, national museums use them too, but also bring together a project management collective in-house too. This is not only a cost saving exercise, as outlined by Jones (V&A 2: 8) but also a way in which the museum can have more control over the process and also the creative development which is an important part of museum projects. Organisations are all in open systems and, therefore, in constant uncertainty. In order to deal with the uncertainty of aspects outside of the organisation, organisations can create 'buffering' to protect themselves from it by bringing the

uncertain areas to within the organisation or allocate resources to deal with those particular areas (Pugh & Hickson 2007: 64). This is usually sales or something commercially related, but it can include project management so that the organisation keeps more direct input to the project and process. This was how the Victoria and Albert Museum approached FuturePlan as Jones (Director 2001-2011) outlined. It both saved money, and also enabled the Museum to have more control over the creative process and ownership of project management skills. Ultimately, it is getting the right resources in the right order, place and at the right time, for the right price. People make projects happen, and well-managed groups of people with a clear common mission and goal-orientated approach to projects will be more collective, less siloed and have more ownership of and motivation for the project.

### **Limitations of the research**

It is important to consider the limitations of the chosen research methodologies, and in this conclusion to reflect on the choices made in the thesis and what the perceived limits of the conclusions may be. As with all methodologies and approaches, there are limitations and should be considered when considering what is appropriate for the subject matter. I was involved in many of the examples used in this thesis and it is important to acknowledge the potential limitations, as well as the benefits, of being a part of the case study and the environment, as well as what my relationship does with the research participants. Consideration should also be given to the level of access and permission I have been given, as well as the need for self-appraisal and even self-censorship, so that the thesis has objectivity and balance.

Case study research has been described in the past as unstructured and not methodically rigorous (Yin 2009: 3). If there are too many gaps in the data, then the risk is that too many generalisations will be taken from the results. The reliability of the data directly influences the validity of the conclusions that can be drawn from them. Reflecting on this, the conclusions that can be drawn must be understood in the parameters that they have been gathered and exist in. This includes the UK context of the museums selected; the number of case studies; the personal connection I have to them. Considering all of these factors, the conclusions drawn have included reflection

on their potential bias and inaccuracies that could come from qualitative research. The case study approach accommodated different types and sources of data, which dealt with the variety of sources, and explored the variety of contexts in which the museums and the projects operated. The range of museums that I used in my case studies were chosen because of their type and the projects. For future research projects, it would be possible to expand this research approach to more museums across the UK. However, for this thesis, I limited it to the museums that I knew I have good access to their staff and project content. Through this grounded research approach, the iterative process enabled me to get the most out of the data gathering stage.

Using interviews as a data gathering method also has its strengths and weaknesses. Strengths include the direct contact and immediate response and opportunity to question the people who worked on the museum project. This enables the researcher to drill down into other aspects that may not be visible in written reports and publications too, including the emotive and motivational responses of those involved. What also came out in the interviews was that some of the participants took a reflexive response when looking back on the project and their role and actions. Mayhew spoke about the frustration with the number and cost of external project managers and then added:

“This is only something that I have come to looking in retrospect.”

(Mayhew 2016 Interview)

Interviews, as part of the fieldwork for this thesis, were an essential part of the grounded theory approach to gather data. It also an opportunity to bring different voices to the narrative. However, as with all interview data, there are limitations with the sample size of interviewees, their related project type (for example) and the fact that I had a connection with some of the projects and interviewees.

### **Future Research**

The research area of museum, projects, and project management is just emerging within the wider context of museums studies. This research contributes to this area,

but collectively research has only begun to touch the very broad, complex and important subject of museums and the influences of the external environment in terms of their structure, culture and behaviour. Capital projects are a good way of exploring these areas, as they create a period of rapid and, quite often, documented change, where studies can explore the comparison of before, during, and after a project. Using this lens, organisational theories can be tested and explored. Ultimately, museum change through capital projects can be discussed from a range of different theoretical approaches. Future research to build on this can address some of the limitations identified above. This could include more museums so that there is a larger sample size, as there are many more museums that have gone through capital projects and it would be good to gather more evidence and see if there are different findings that have new angles, such as regions of the UK or where the museum is based (city, countryside etc.). Gathering more interviews from senior staff at new institutions would be good, but also it would be possible to carry out a questionnaire across these museums and gather responses and data from all levels of staff. The flexible-framework approach for open project management (OPM) could be developed into a more practically focussed toolkit and case study based approach for future museum projects.

Future research may consider exploring museum capital projects in different countries, particularly countries where museums have different histories and influences from their environment. The case studies here involved museums of different types, but this approach may also be appropriate for other cultural institutions, including organisations like the National Trust and English Heritage etc. This may bring different findings and conclusions to museums, because of the variance in the influencing factors of their environment.

Future research could also include consideration of leadership studies and contribute to practical training in museums, particularly when understanding the motivation of museum leaders and their route into their position. In order to truly diversify the museum workforce and its leadership, there must be opportunities for diversity and flexibility of approach. As shown in the case studies, some museums have overarching

institutions, such as universities and local authorities, so there may be opportunities there for these larger organisations to support their museums in encouraging experience and use of project management with a more diverse workforce. By crossing the internal divisional lines of an organisational structure, there can be increased strength in disciplines like project management.

On a professional front, my aim is to continue to work in management roles and continue to work within higher education and hopefully back into museum environments. In addition to this, I am contributing to several academic and research related conferences over the next year, which include some of the findings in this research combined with my role running a research centre in a University. This combination, I argue, enables researchers to share their research in flexible ways within flexible-frameworks in ways that is otherwise not possible in some organisational and project structures. This includes a mobile-app project with the Pitt Rivers Museum and large scale public engagement events between our research centre and the Ashmolean and the Oxford University Museum of Natural History. All material with researchers as part of these events is recorded, and evaluated with the intention of use as part of Research Excellence Framework (REF) Impact Case Studies.

Finally, museum projects are ephemeral and are all-important during the project then once it is over people move on and the project fades from view. Through this research, the intention was to create an important snapshot of the process from the perspective of some of the key players at a senior level for museum projects carried out between 2001 and 2017. If these interviews had not been carried out, it is quite likely that this sort of experience within projects would never be documented in this way. Having the opportunity to also appropriately draw on my own experience of museum projects gives me an insider knowledge of how much is not written down, how much relies on personal relationships, negotiation, compromise, flexibility, and complex juggling of factors. In some ways, this research provides a unique historical document – analysis of the messy, complex and often undocumented life of museums.

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## **Appendix 1**

### **Ethics approval - Interview Topic Guide**



#### **INTERVIEW TOPIC GUIDE**

##### **Project management in museums – Victoria McGuinness PhD student**

#### **BACKGROUND**

---

1. How did you become involved in museums?
2. What was your role in the museum?
3. What project(s) were you involved in?
4. How was the project funded?
5. How was your role affected during the project?

#### **PROJECT MANAGEMENT**

---

1. What project management style and processes did you use in the museum?
2. Did you use external companies and project managers?
3. What do you feel went right?
4. What do you feel went wrong?
5. Would you do the same again?
6. Was the project on time and on budget?
7. What were the original success criteria and were they met?



8. How many staff and what roles were brought in for the project on temporary contracts?
9. How many staff and what roles from existing staff were included into the project? Did their roles change when they worked on the project?
10. How did all roles continue after the project?

## **ORGANISATION STRUCTURE AND CULTURE**

---

1. What type of organisation was the museum before and after the project?
2. How was the project received and taken on by the museum staff overall?
3. When there were issues, who stepped forward to assist in continuing the project?
4. Who were the main contributors and stakeholders within the museum?
5. Who benefitted most from the project?
6. How was the project concluded and 'business as usual' reinstated?
7. Did behaviours within the organisation change following the project?
8. Was the aim of the project to make the organisation more efficient and what was the outcome?
9. Is the organisation now more resilient and potentially able to continue in a more flexible way?

## **LEADERSHIP**

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1. How was it leading an institution through this project?
2. What effective leadership skills did you use in order to progress and guide the project?
3. Did the project change the direction of leadership or was the message consistent before, during and after?

## **TEAMWORK**

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1. What new teams were created to deliver this project?
2. Has the team been kept on to deliver other projects?
3. What range of skill sets were necessary and used as part of the project?

## **COMMUNICATION SKILLS**

---

1. How do you keep your employees informed with what is going on in the organisation?
2. What methods do you use to keep informed with what was going on?
3. What kind of reports/proposals were used for internal and external communications?
4. How much of an influence did the external stakeholders play – such as funders etc?
5. How did the museum staff and other key stakeholders communicate issues throughout the project?
6. How was morale with the project team and the wider team?
7. What were the final outcomes of the project and how were they communicated?

## **OTHER OUTCOMES**

---

1. Were there any other outcomes from the project?
2. Were there unexpected benefits or stakeholders?
3. What lessons were learnt in this project?
4. Were changes implemented in subsequent projects?

## Appendix 2

### Ethics approval – Participant Information Form



#### Participant Information Sheet

**1. Study title:**

**Project Management in Museums** – Victoria McGuinness:

[victoria.mcguinness@humanities.ox.ac.uk](mailto:victoria.mcguinness@humanities.ox.ac.uk)

**2. Background and aims of the study**

Many museum projects apply the principles of general management to the complex and creative environments that are museums. With projects accessing greater levels of outside funding than ever before, museums find ways of delivering complex and sometimes contentious projects, which require staff to change the way they work and engage with a range of unfamiliar concepts. The overall aim of my research is to look at the nature of project management within a museum environment, particularly those that receive substantial public support and explore how this affects the museum from initiation to evaluation of the outcomes.

- Research into management techniques with particular reference to capital projects in order to further the understanding of their effect on both the museum and the community, as well as how this is evaluated.
- Assess existing museum project processes, particularly evaluative techniques through case studies.
- Further the understanding of Project Management in different museum environments.

Methodology: Using case studies and collaboration with other museums, my work will investigate how Institutions are affected before, during and after, what are often major publicly funded projects. In order to reach targets and goals necessary to make their museum more relevant to their communities, many museums take on projects or extensive programmes (a series of projects). My fieldwork will involve a combination of work with case studies of museums that have undertaken such major projects. The main objective of my work is to build upon the solid foundations of research into

Museum Management, focusing on the relatively new issues related to capital projects within museums. I aim to analyse their initiation, life cycle and consequent evaluation in order to establish the impact and influence of public funding, its relevance to the museum 'communities' and the on-going physical and psychological effect on the existence and continuation of the remaining museum.

Victoria McGuinness works at the University of Oxford as Business Manager for The Oxford Research in the Humanities (TORCH) and is a part-time, distance learning PhD student with the School of Museum Studies at Leicester University.

**3. Why have I been invited to take part?**

You have been invited to participate in this study due to your role in museums and also direct involvement in significant projects.

**4. Do I have to take part?**

You can choose whether or not you would like to participate and you are welcome to ask any questions about the study before deciding whether to do so. You may withdraw yourself and your data from the study without penalty at any time, and without giving a reason, by advising the researchers of this decision, and you could also be anonymous if you prefer.

**5. What will happen in the study?**

If you are happy to take part in the study, you will be asked to sign a consent form]. As part of this study, your participation will involve an interview (30 minutes), which will be audio recorded and a questionnaire. This interview can take place at a location that is convenient for you. The questionnaire is online.

**6. Are there any potential risks in taking part?**

There are no risks identified with this research (vulnerable adults, children, confidential data etc), but researcher and participant safety will be continually assessed throughout the processes.

**7. What happens to the research data provided?**

If you wish to remain anonymous, this is possible, however, for the interviews, I would like to include your name and role, and use direct quotes.

The data will be stored on a server and research data and records will be retained for a minimum of 3 years after publication. Storage and use of participant information will be undertaken in accordance with the Data Protection Act 1998.

**8. Will the research be published?**

Leicester University is committed to the dissemination of its research for the benefit of society and the economy and, in support of this commitment, has established an

online archive of research materials. This archive includes digital copies of student theses successfully submitted as part of postgraduate degree programme. Holding the archive online gives easy access for researchers to the full text of freely available theses, thereby increasing the likely impact and use of that research.

If you agree to participate in this project, the research will be written up as a thesis. On successful submission of the thesis, it will be deposited both in print and online in the University archives, to facilitate its use in future research. The intention is that papers will also be produced after the thesis for peer reviewed journals.

**9. Who has reviewed this project?**

This project has been reviewed by, and received ethics clearance through, the Leicester University Research Ethics Committee.

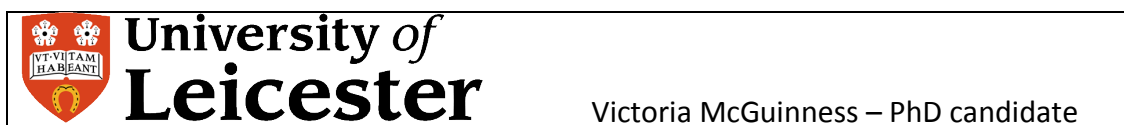
**10. Who do I contact if I have a concern about the study or I wish to complain?**

For studies solely reviewed by the University research ethics committee:

“If you have a concern about any aspect of this project, please speak to the researcher Victoria McGuinness – [victoria.mcguinness@humanities.ox.ac.uk](mailto:victoria.mcguinness@humanities.ox.ac.uk) who will do her best to answer your query. The researcher should acknowledge your concern within 10 working days and give you an indication of how she intends to deal with it. If you remain unhappy or wish to make a formal complaint, please contact the University Ethics committee who will seek to resolve the matter in a reasonably expeditious manner: [ethics@le.ac.uk](mailto:ethics@le.ac.uk)

## Appendix 3

### Ethics approval – Consent Form



#### Consent Form

STUDY TITLE                      **Project Management in Museums**

RESEARCHER DETAILS:    **Victoria McGuinness** – doctoral student:  
[victoria.mcguinness@humanities.ox.ac.uk](mailto:victoria.mcguinness@humanities.ox.ac.uk)

PURPOSE OF STUDY            Many museum projects apply the principles of general management to the complex and creative environments that are museums. With projects accessing greater levels of outside funding than ever before, museums find ways of delivering complex and sometimes contentious projects, which require staff to change the way they work and engage with a range of unfamiliar concepts. The overall aim of my research is to look at the nature of project management within a museum environment, particularly those that receive substantial public support and explore how this affects the museum from initiation to evaluation of the outcomes.

- Research into management techniques with particular reference to capital projects in order to further the understanding of their effect on both the museum and the community, as well as how this is evaluated.
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museums. I aim to analyse their initiation, life cycle and consequent evaluation in order to establish the impact and influence of public funding, its relevance to the museum 'communities' and the on-going physical and psychological effect on the existence and continuation of the remaining museum.

Participant  
initials each  
box

1. I have read the participation information sheet and had the opportunity to ask questions.
2. I understand that this project has been reviewed by, and received ethics clearance through, the Leicester University Research Ethics Committee
3. I understand that my participation is voluntary and that I am free to withdraw myself or my data at any time, without giving any reason, and without any adverse consequences
4. I understand who will have access to personal data provided
5. I understand how personal data will be stored eg according to the Data Protection Act; and what will happen to the data at the end of the project
6. I understand how research will be written up and published
7. I understand how to raise concerns or make a complaint.
8. I consent to being audio recorded.
9. I understand that audio recordings / videos / photos will be used in research outputs eg project website, academic conferences, journal publications, research archives.
10. I agree to take part in the study.

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Participant name, signature \_\_\_\_\_ Date \_\_\_\_\_

Researcher name, signature \_\_\_\_\_ Date \_\_\_\_\_

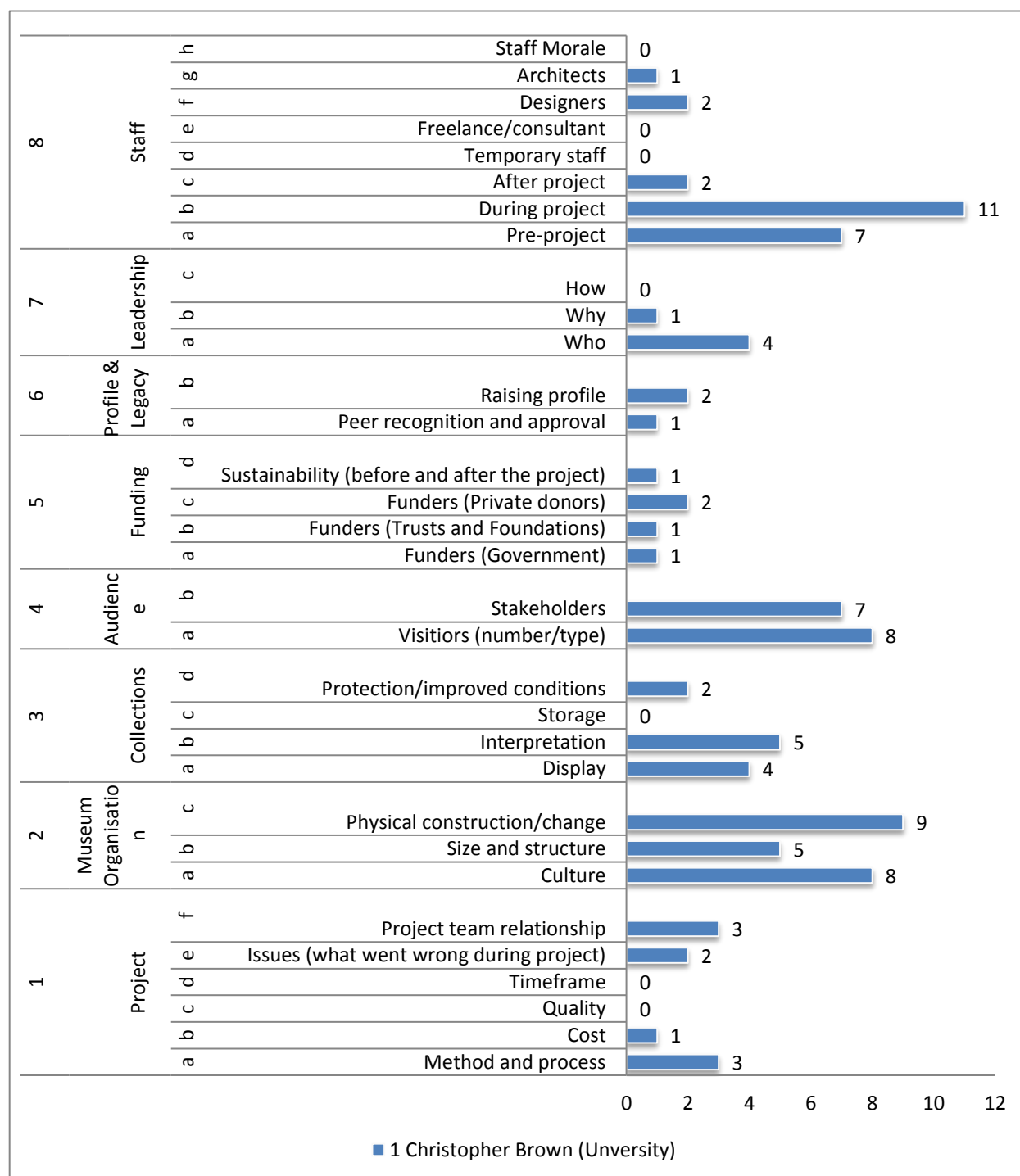
## Appendix 4 - Interview Data Summary

### Breakdown by Interviewee

#### Figure 1. Professor Christopher Brown

Previously Director of the Ashmolean Museum, Oxford

Ashmolean Redevelopment Project

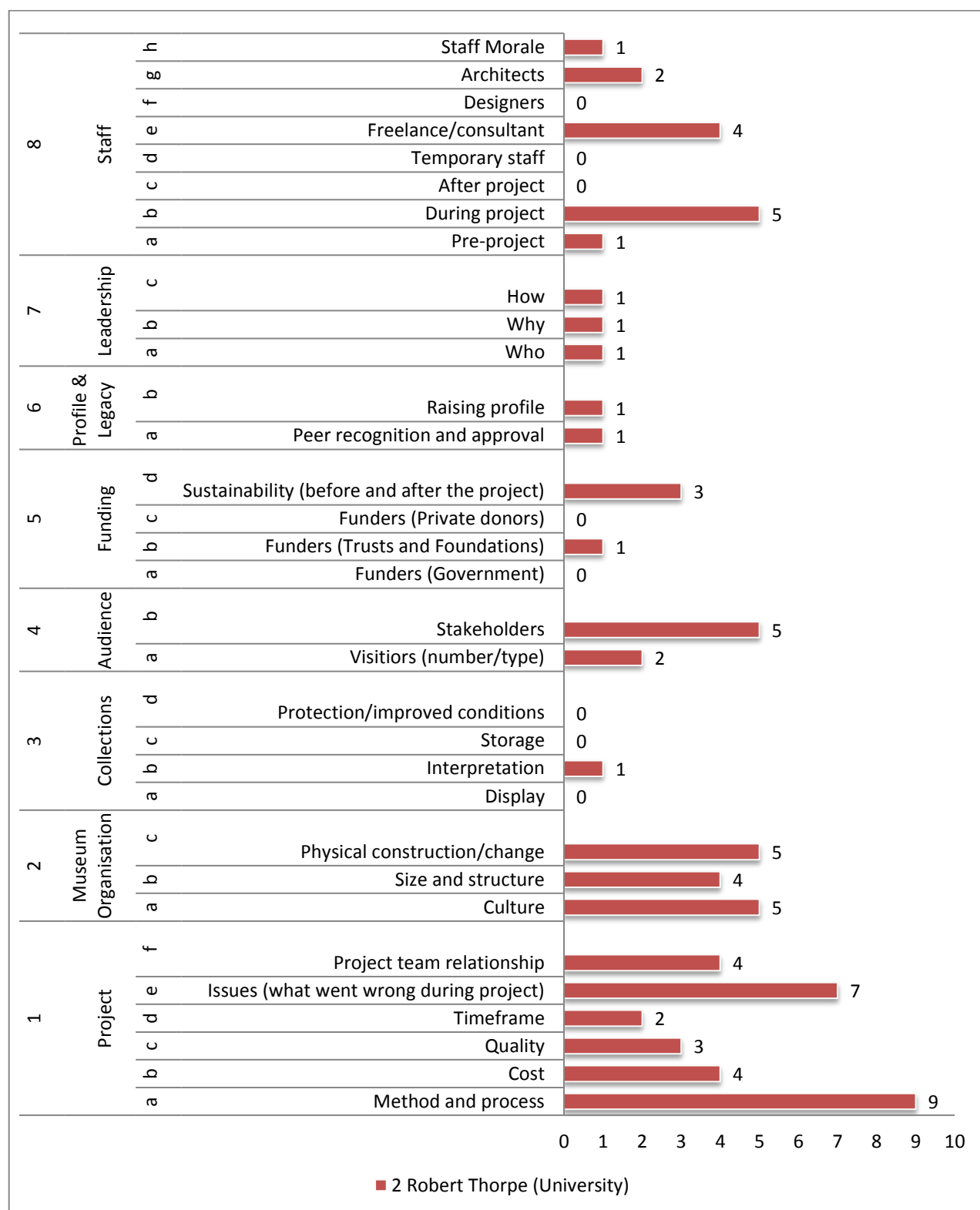




**Figure 2. Robert Thorpe**

**Previously Operations Director, Ashmolean Museum, Oxford**

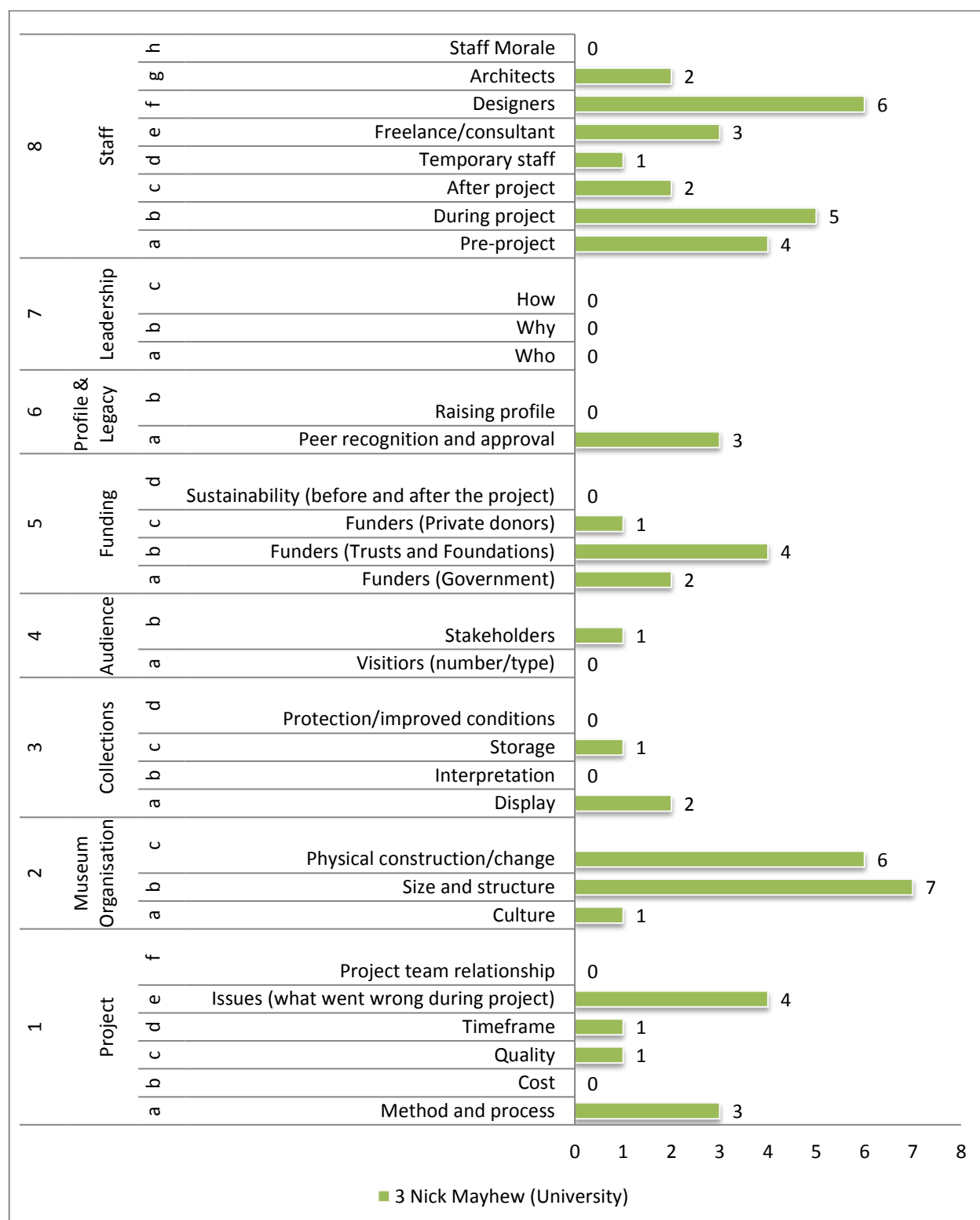
**Ashmolean Redevelopment Project**



### Figure 3. Professor Nick Mayhew

Previously Deputy Director (Collections), Ashmolean Museum, Oxford

### Ashmolean Redevelopment Project



**Figure 4. Andy Bramwell**  
**Previously external Project Manager**  
**Ashmolean Redevelopment Project**

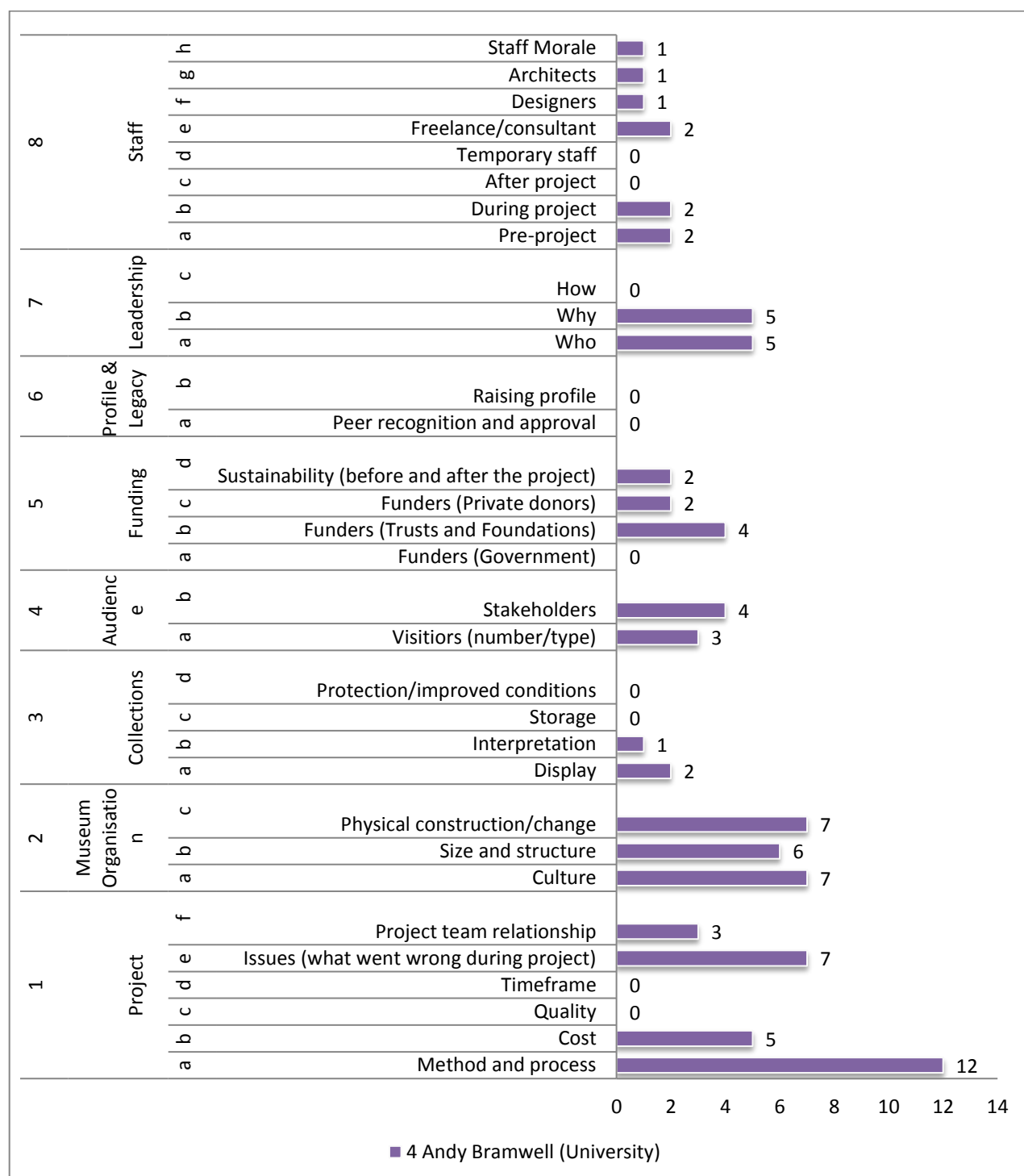
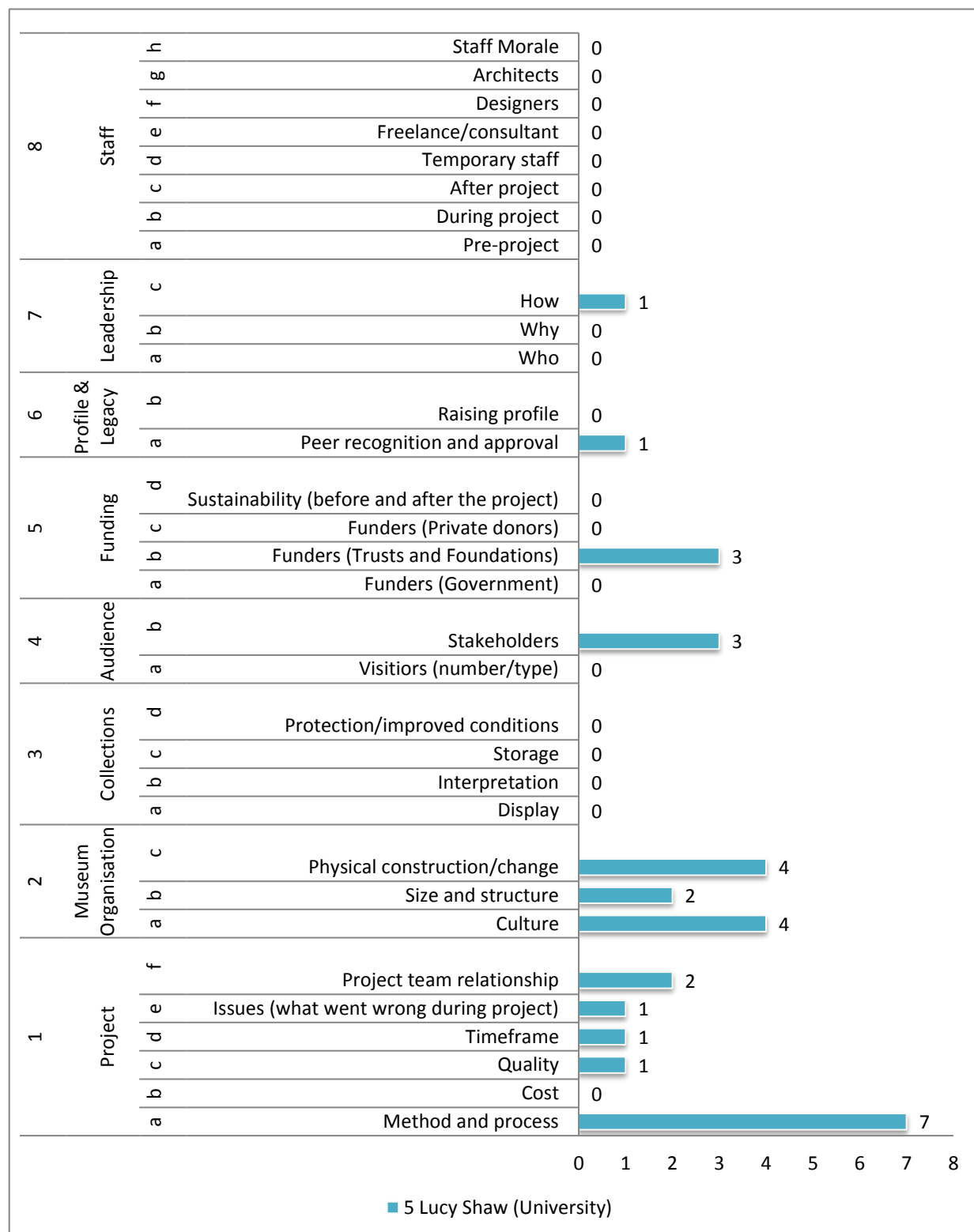


Figure 5. Lucy Shaw

Head of Oxford University Museum Partnership (OUMP)

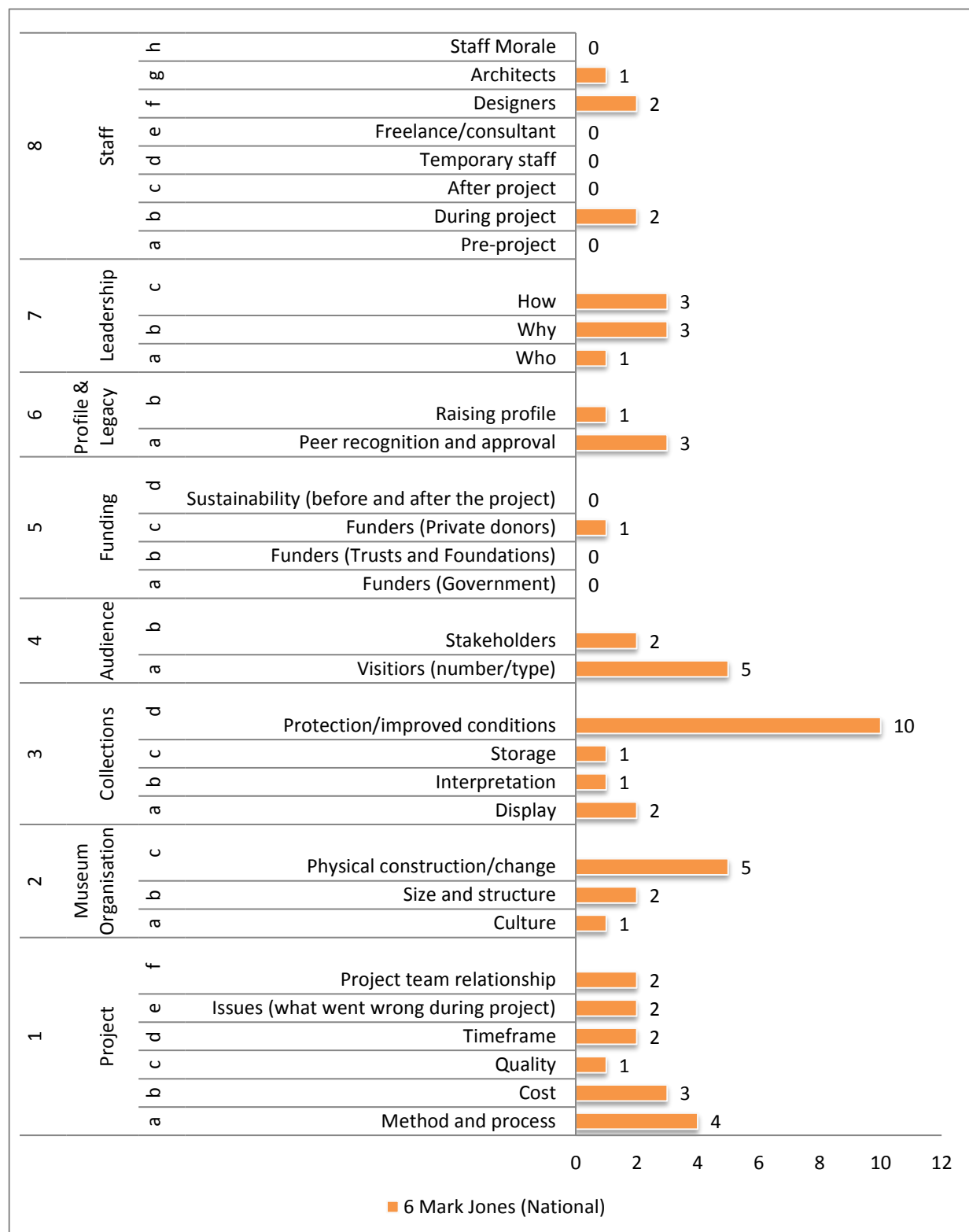
Several projects and organisations



**Figure 6. Mark Jones**

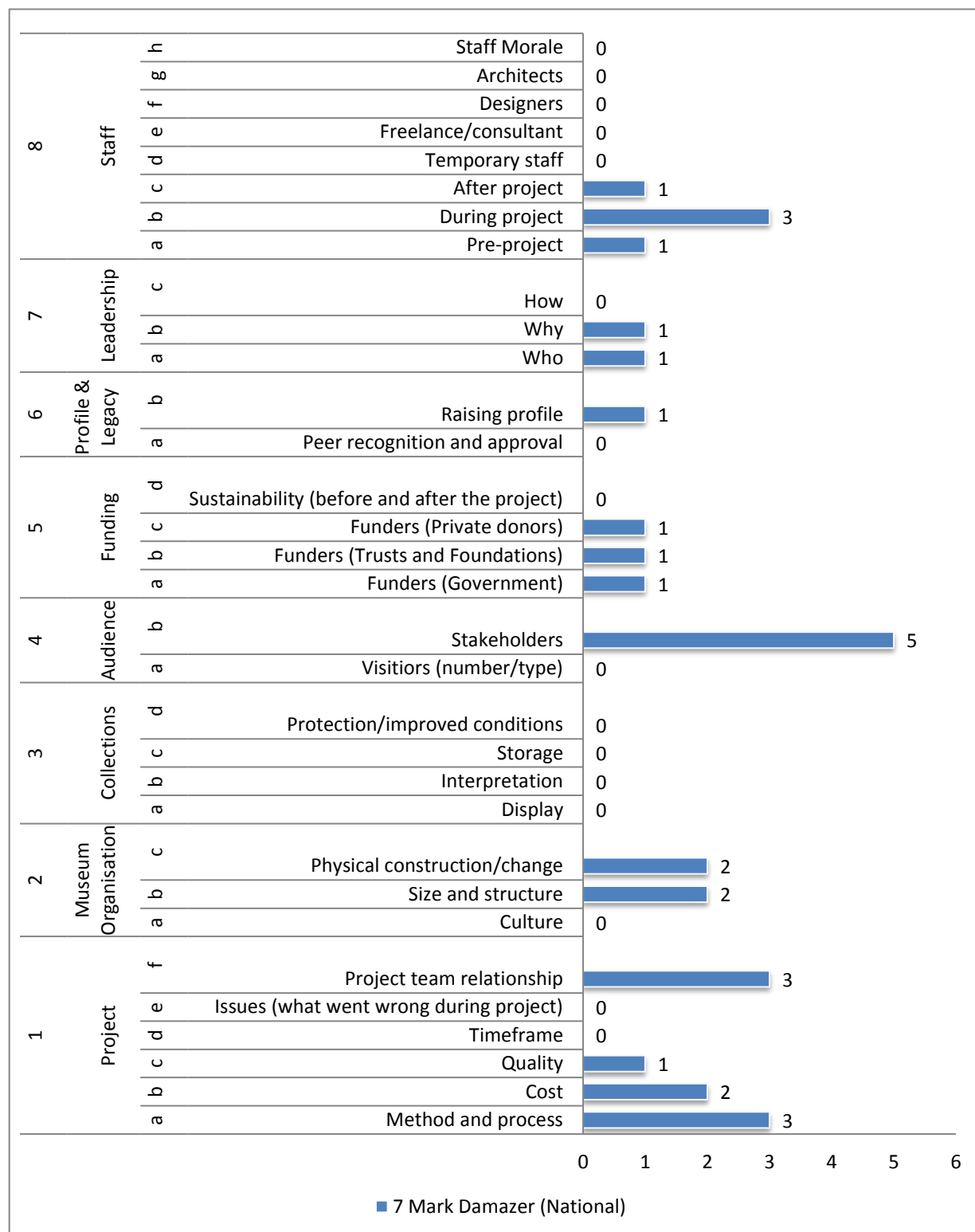
**Previously Director of the Victoria and Albert Museum (2001-2011)**

**V&A FuturePlan**



**Figure 7. Mark Damazer**

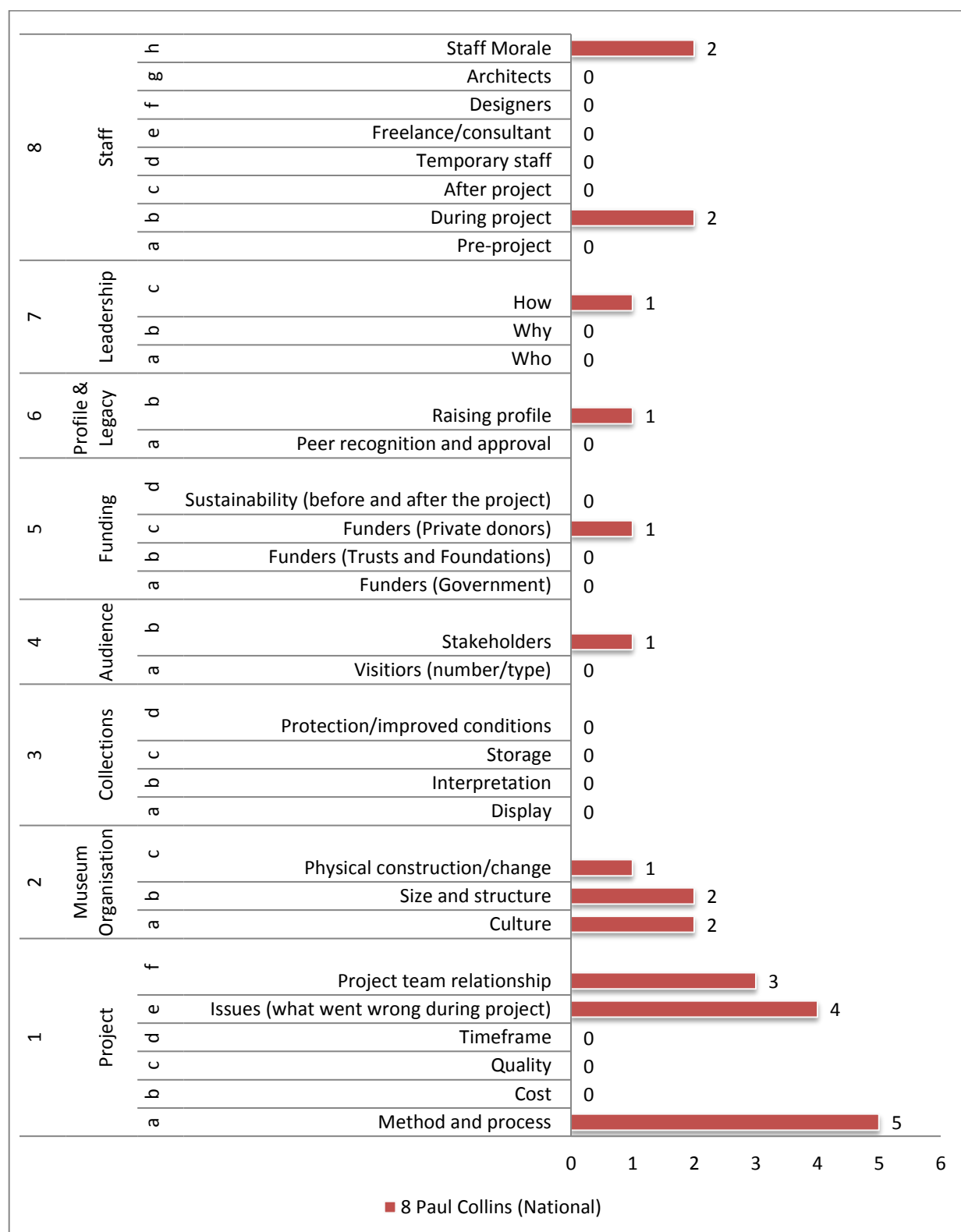
**Trustee for the Victoria and Albert Museum and previously Radio 4 Controller  
(‘World in 100 Objects’ with Neil MacGregor)**



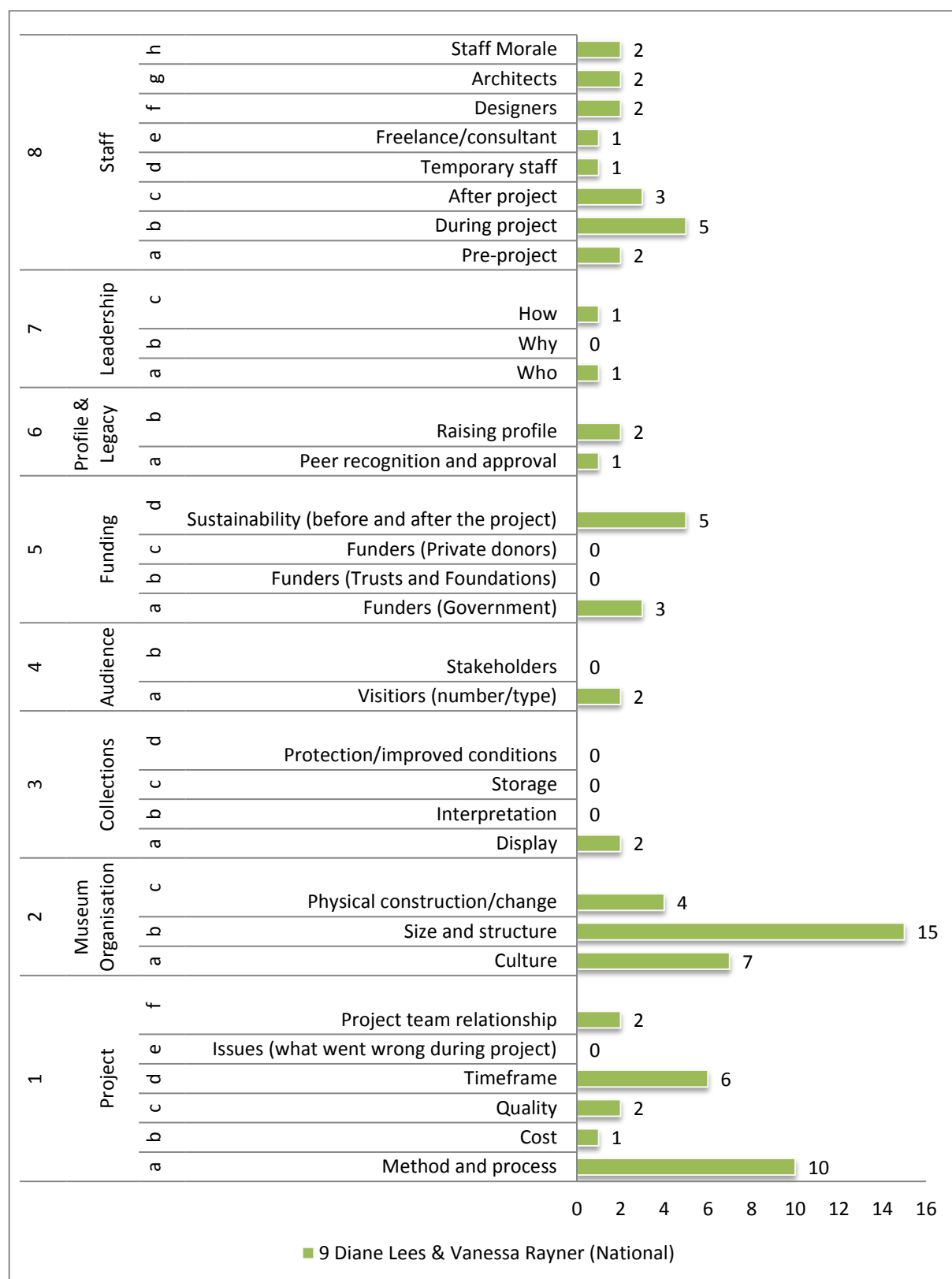
**Figure 8. Dr Paul Collins**

**Previously Curator on Zayed National Museum Project**

**British Museum**



**Figure 9. Diana Lees (Director-General for Imperial War Museums) and Vanessa Rayner (Head of Planning and Strategy)**  
**Imperial War Museum London Redevelopment**

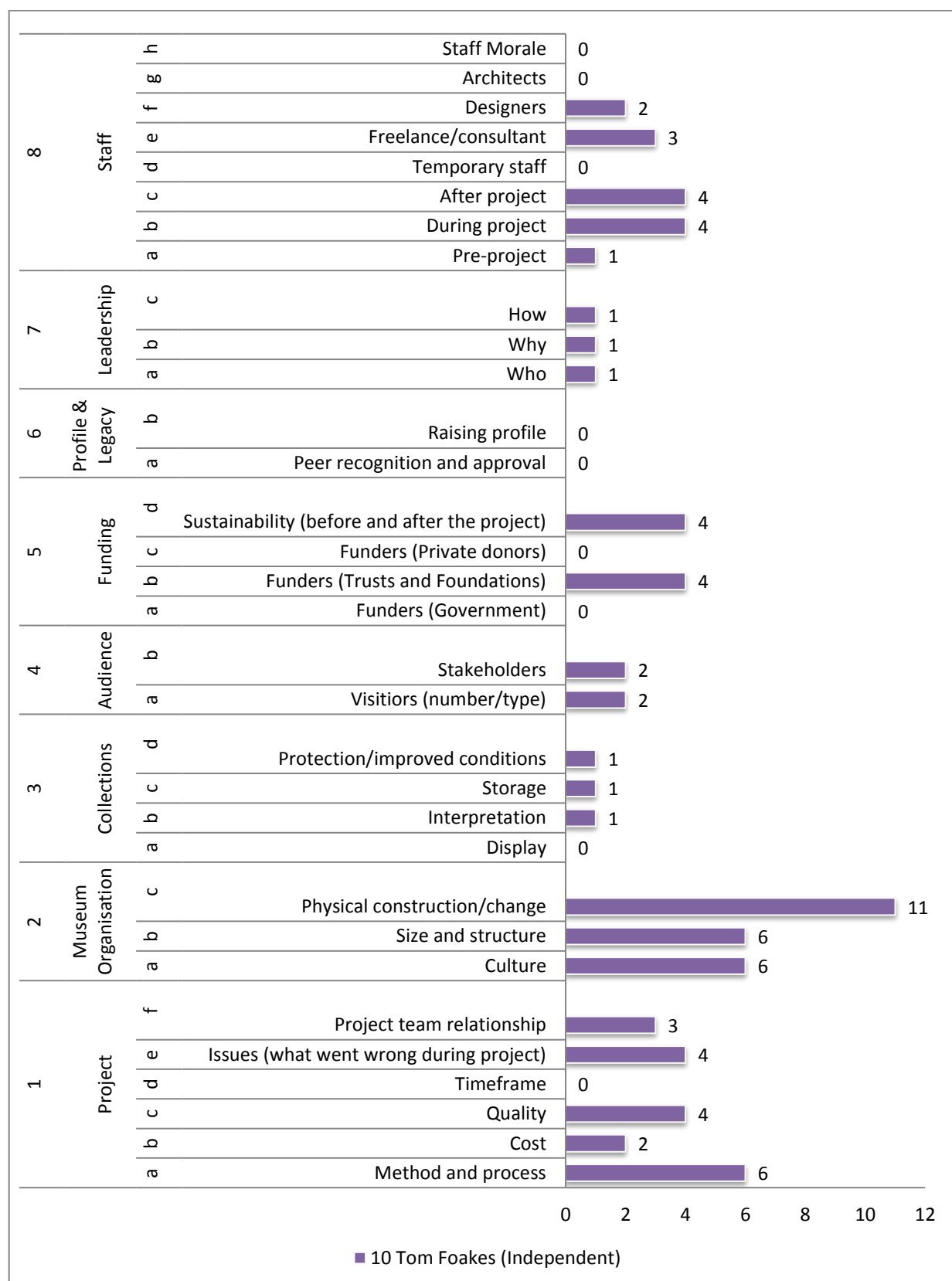




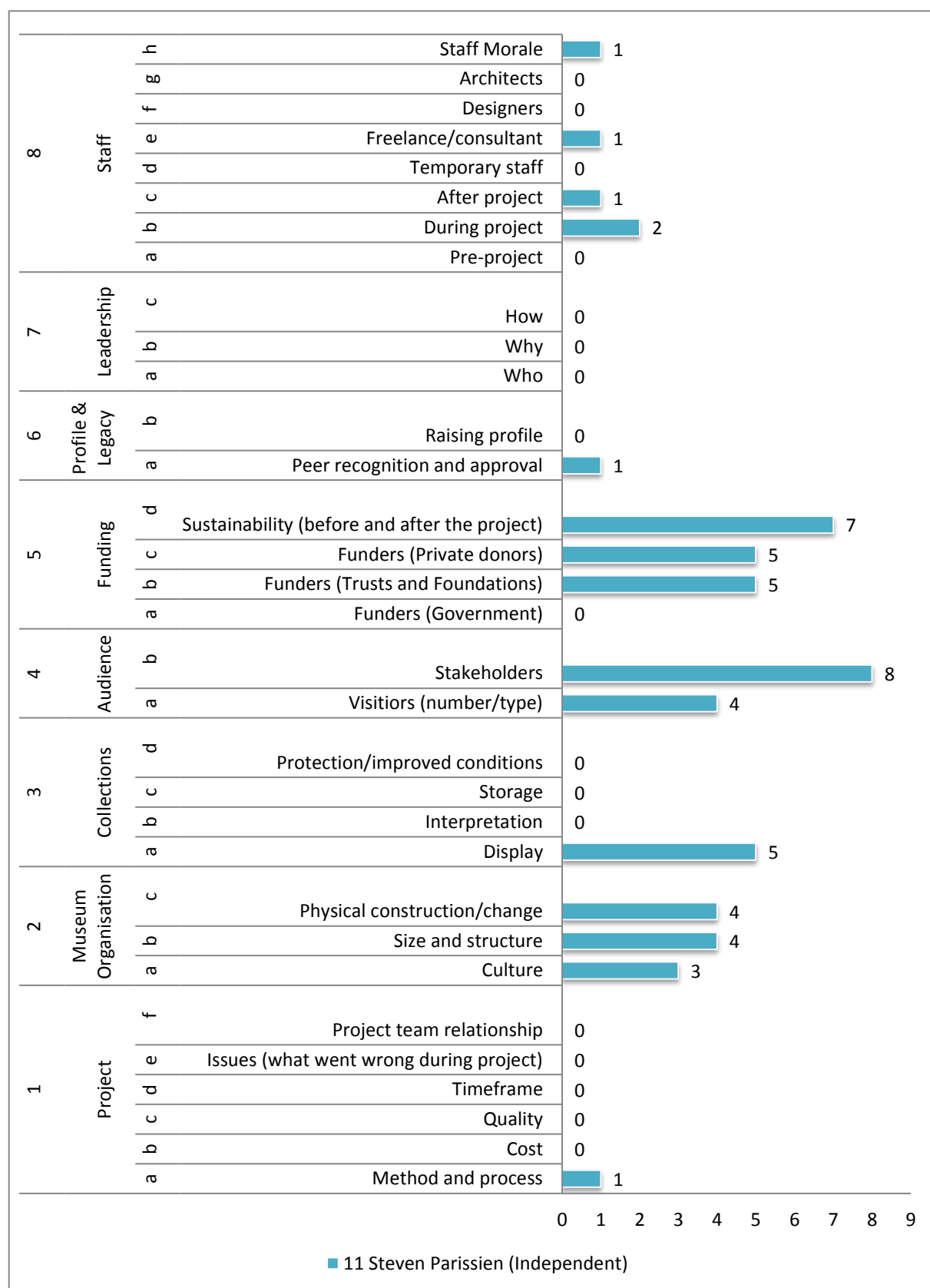
**Figure 10. Tom Foakes**

**Director of Museum of the Order of St John, London**

**Open Gate Project**



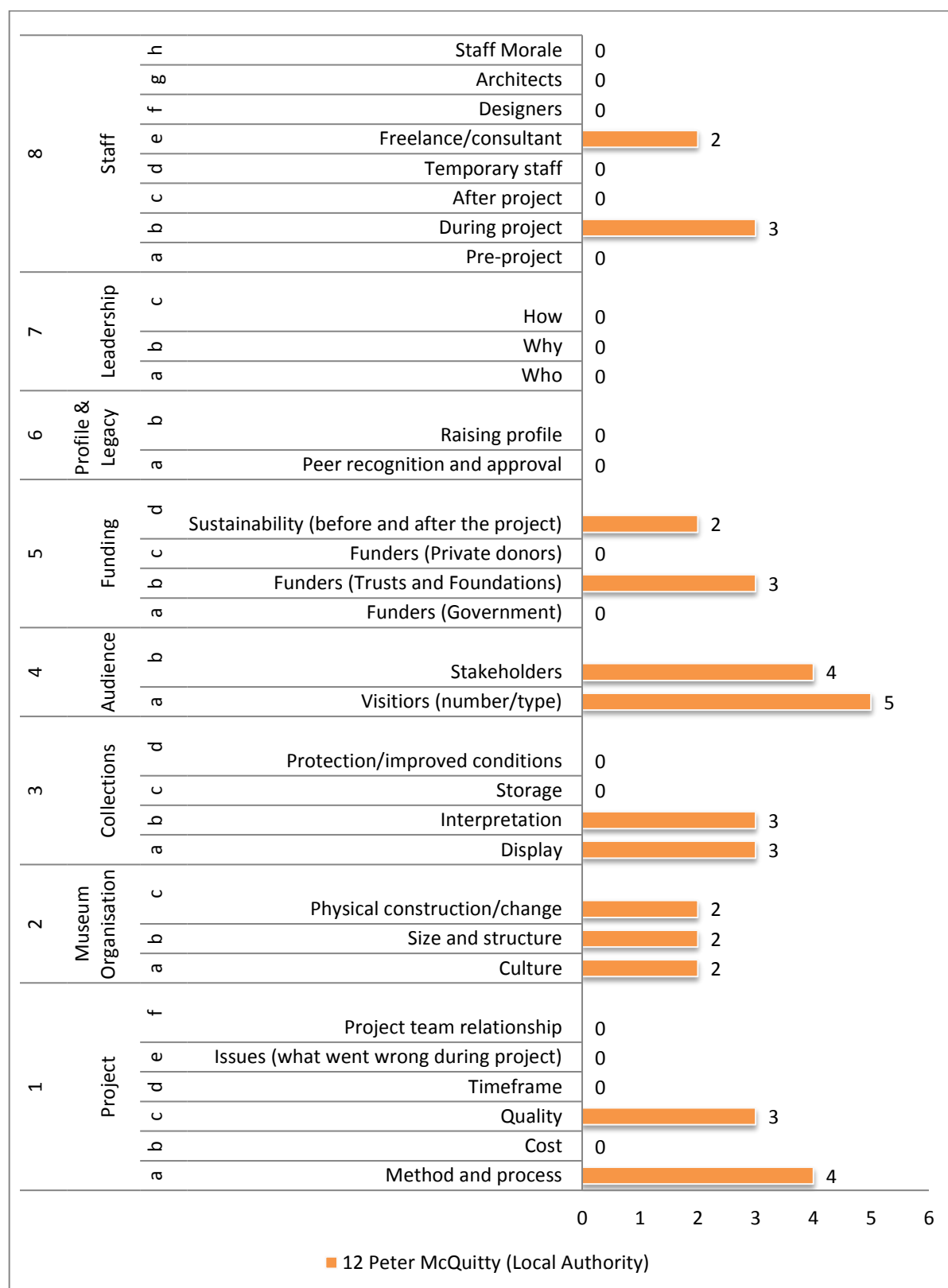
**Figure 11. Professor Steven Parissien**  
**Director of Compton Verney Art Gallery**



**Figure 12. Peter McQuitty**

**Head of Policy, Culture and Communications at Oxford City Council**

**Museum of Oxford Redevelopment 'Oxford Hidden Histories'**



**Figure 13. Breakdown by question**

| <b>Name</b>                          | <b>Top 1 category</b> | <b>Top 2 category</b> | <b>Top 3 category</b> |
|--------------------------------------|-----------------------|-----------------------|-----------------------|
| <b>Christopher Brown</b>             | Staff                 | Museum Organisation   | Audience              |
| <b>Robert Thorpe</b>                 | Project               | Museum Organisation   | Staff                 |
| <b>Nick Mayhew</b>                   | Staff                 | Museum Organisation   | Funding               |
| <b>Andy Bramwell</b>                 | Project               | Museum Organisation   | Leadership            |
| <b>Lucy Shaw</b>                     | Project               | Museum Organisation   | Audience              |
| <b>Mark Jones</b>                    | Collections           | Project               | Museum Organisation   |
| <b>Mark Damazer</b>                  | Project               | Audience              | Staff                 |
| <b>Paul Collins</b>                  | Project               | Museum Organisation   | Staff                 |
| <b>Diane Lees and Vanessa Rayner</b> | Museum Organisation   | Project               | Staff                 |
| <b>Tom Foakes</b>                    | Museum Organisation   | Project               | Staff                 |
| <b>Steven Parissien</b>              | Funding               | Audience              | Museum organisation   |
| <b>Peter McQuitty</b>                | Audience              | Project               | Collections           |

Figure 14.

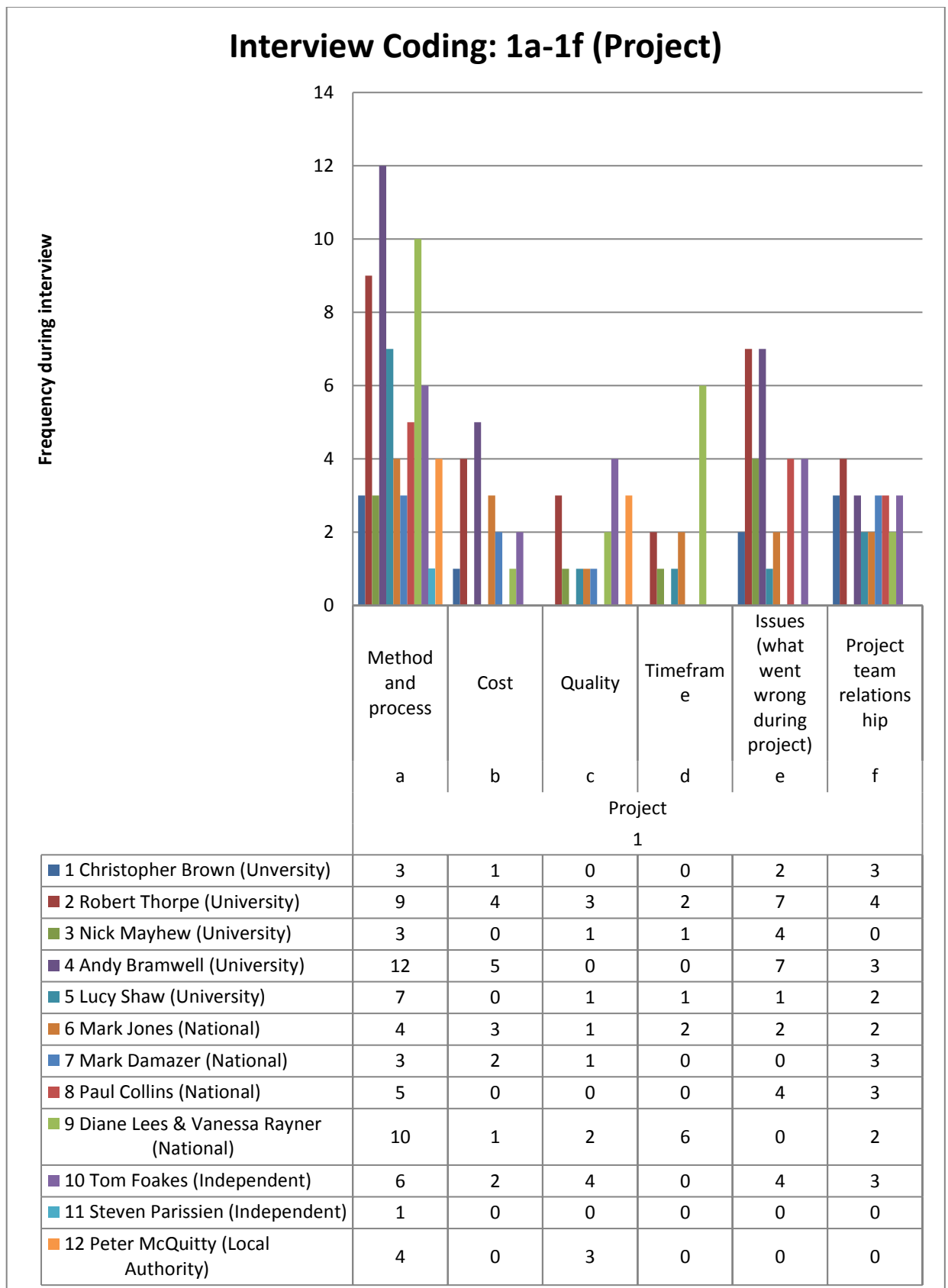


Figure 15.

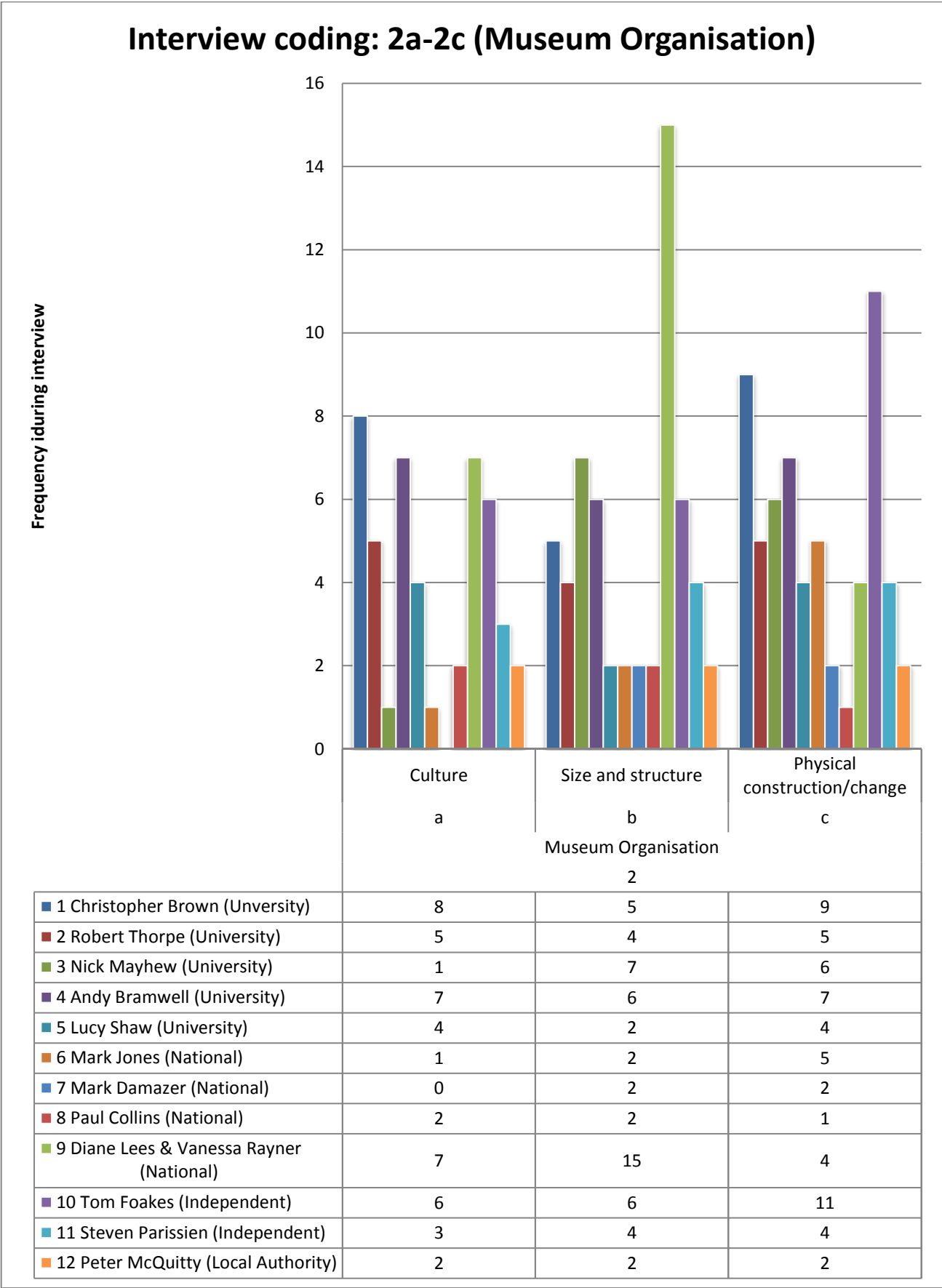


Figure 16.

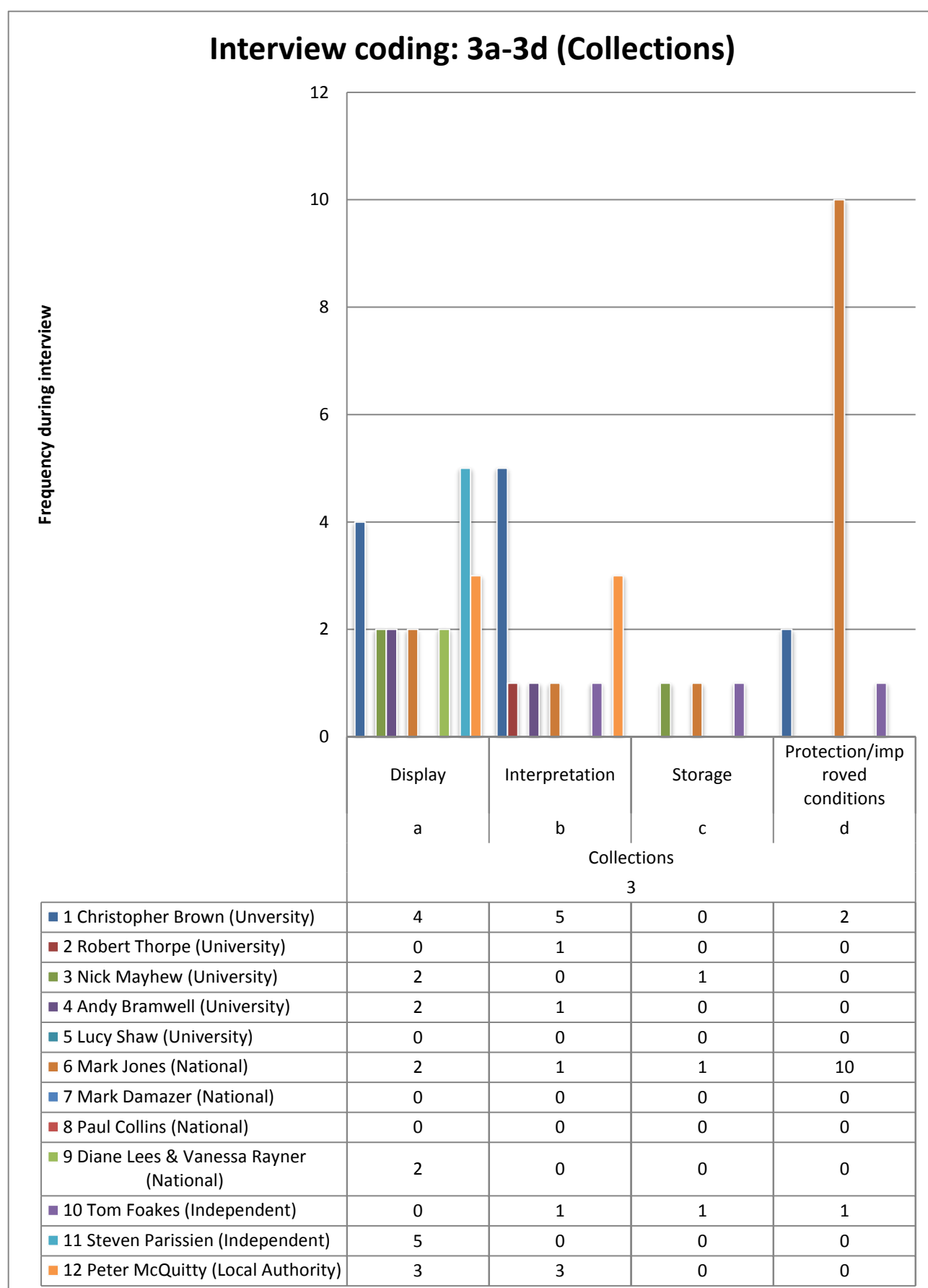


Figure 17.

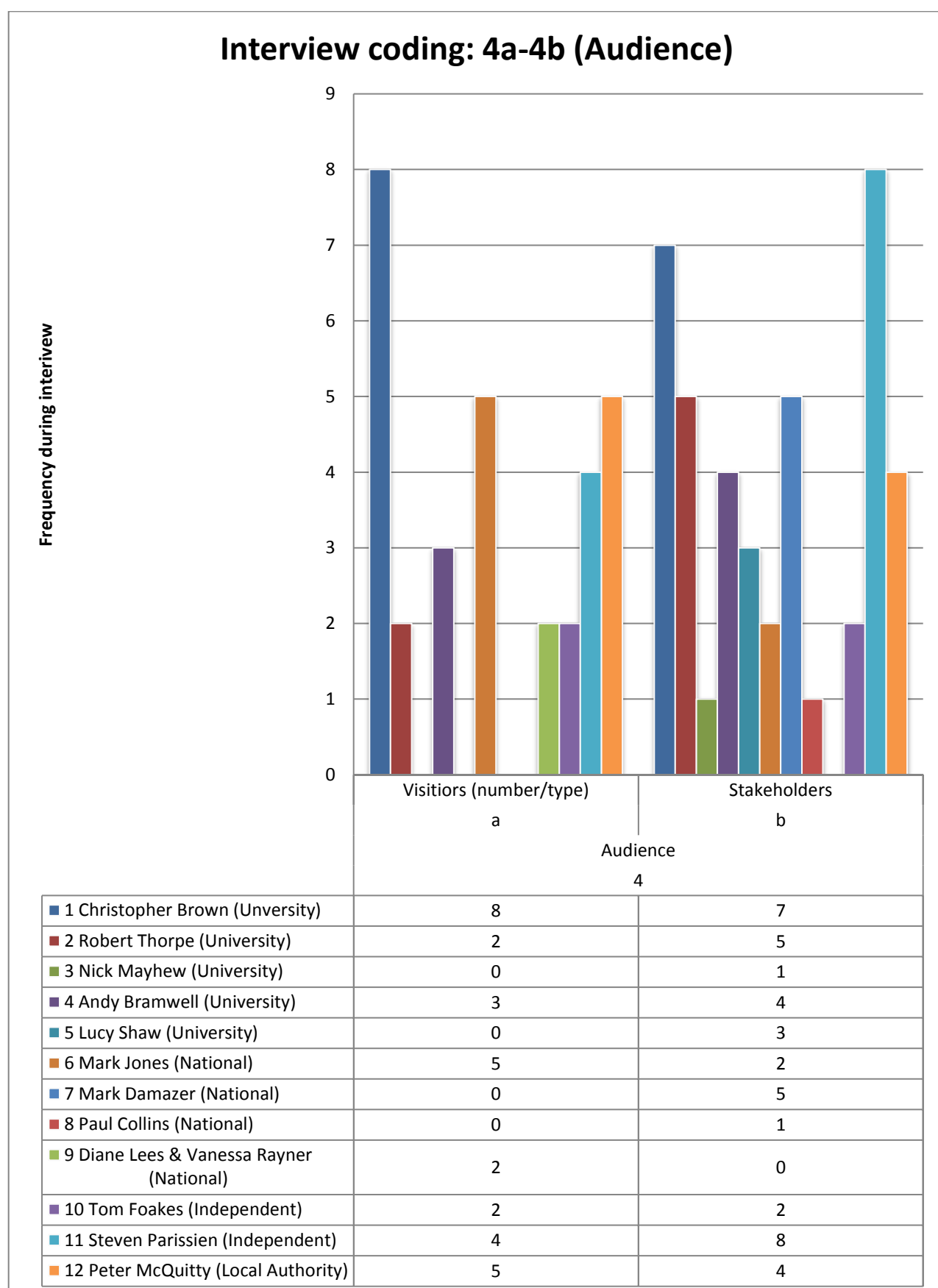




Figure 18.

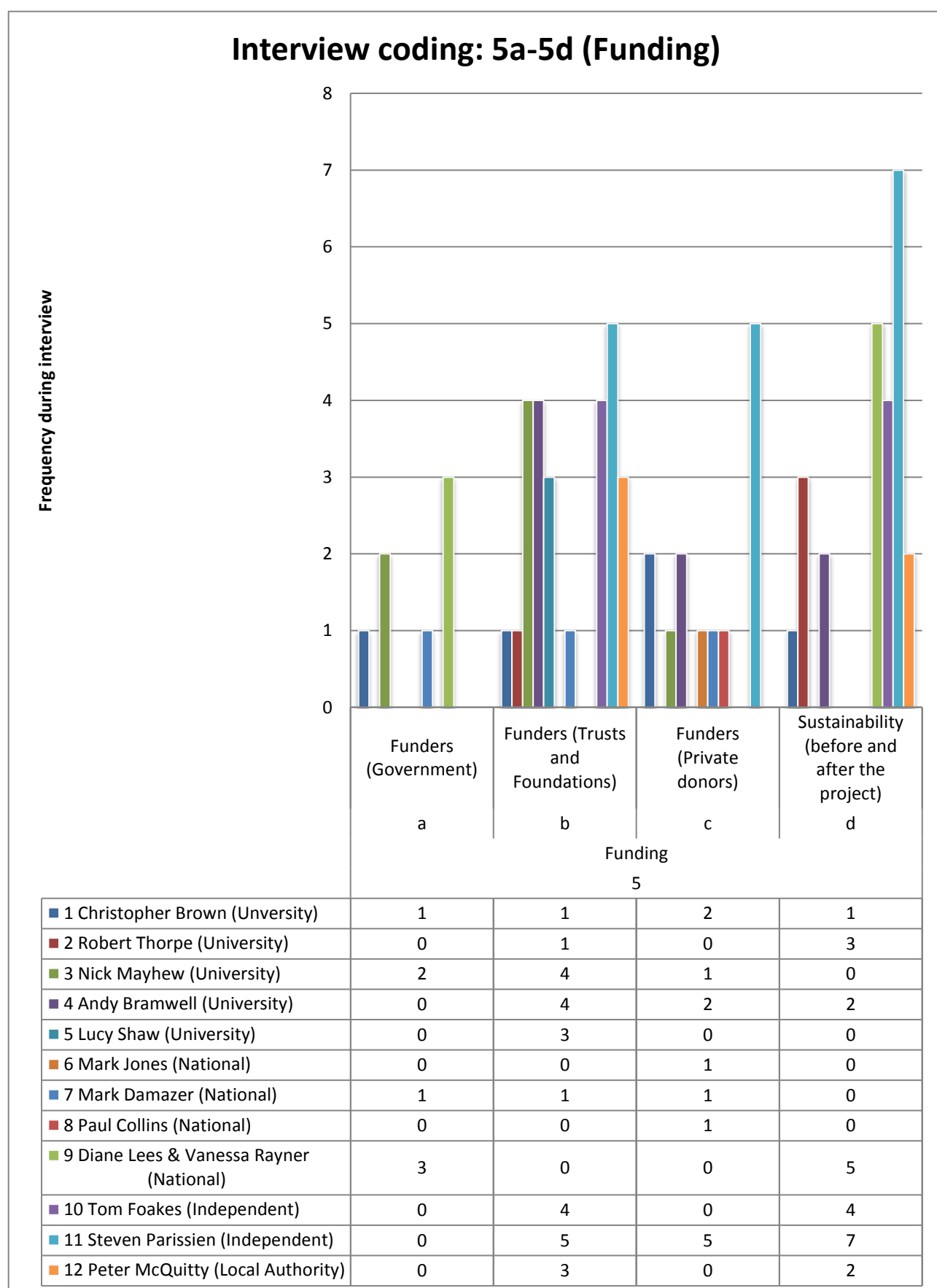


Figure 19.

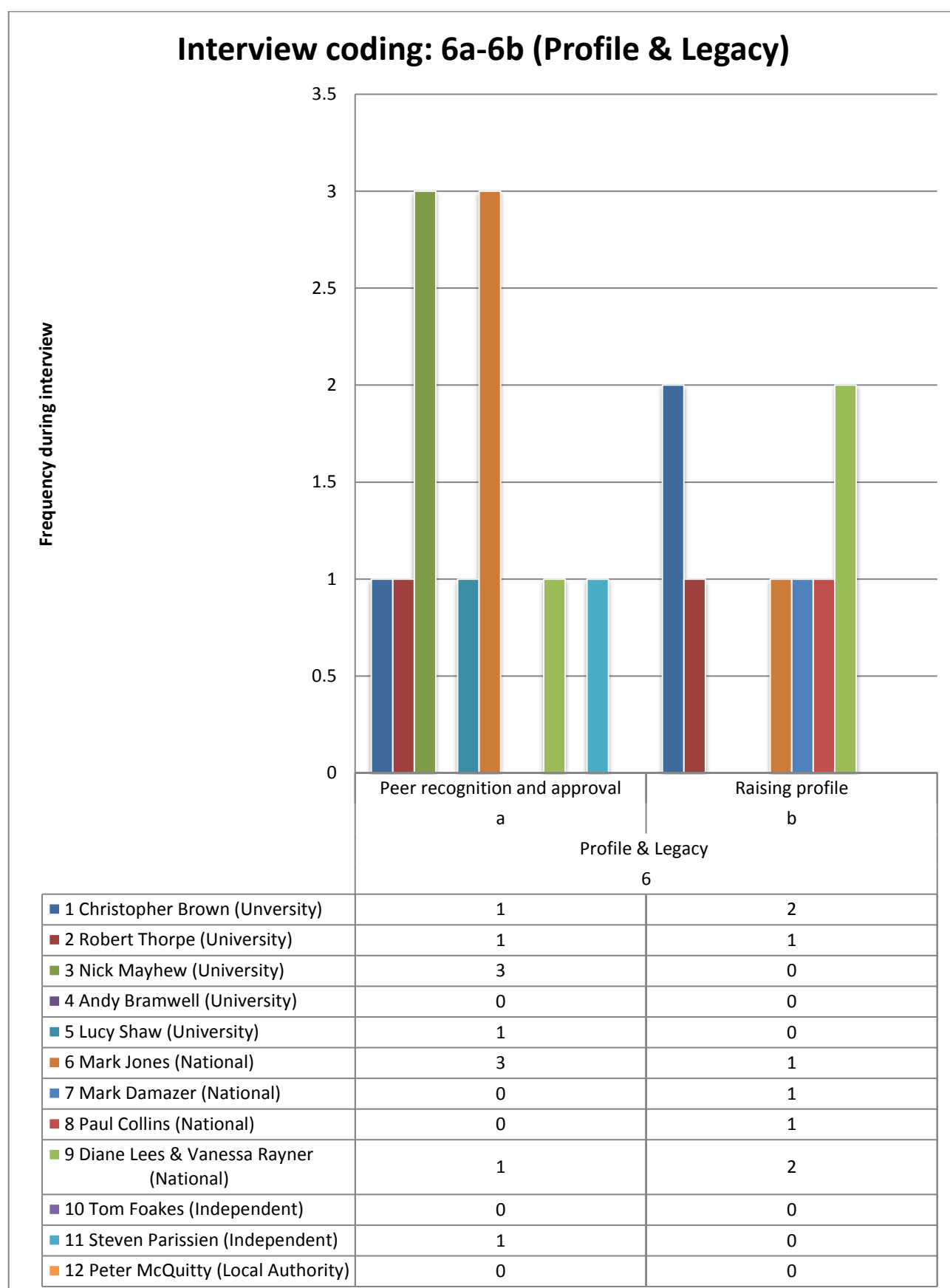


Figure 20.

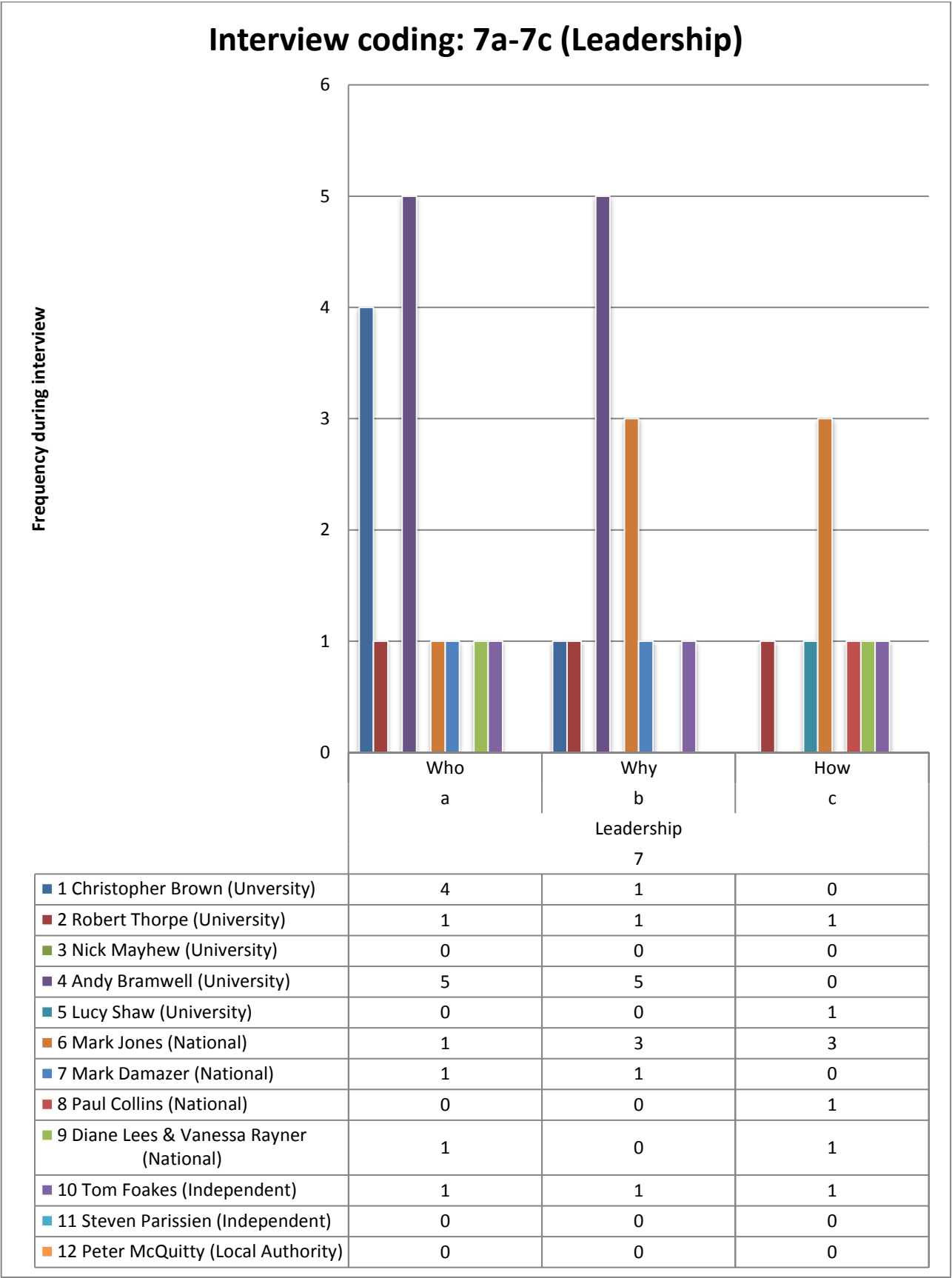
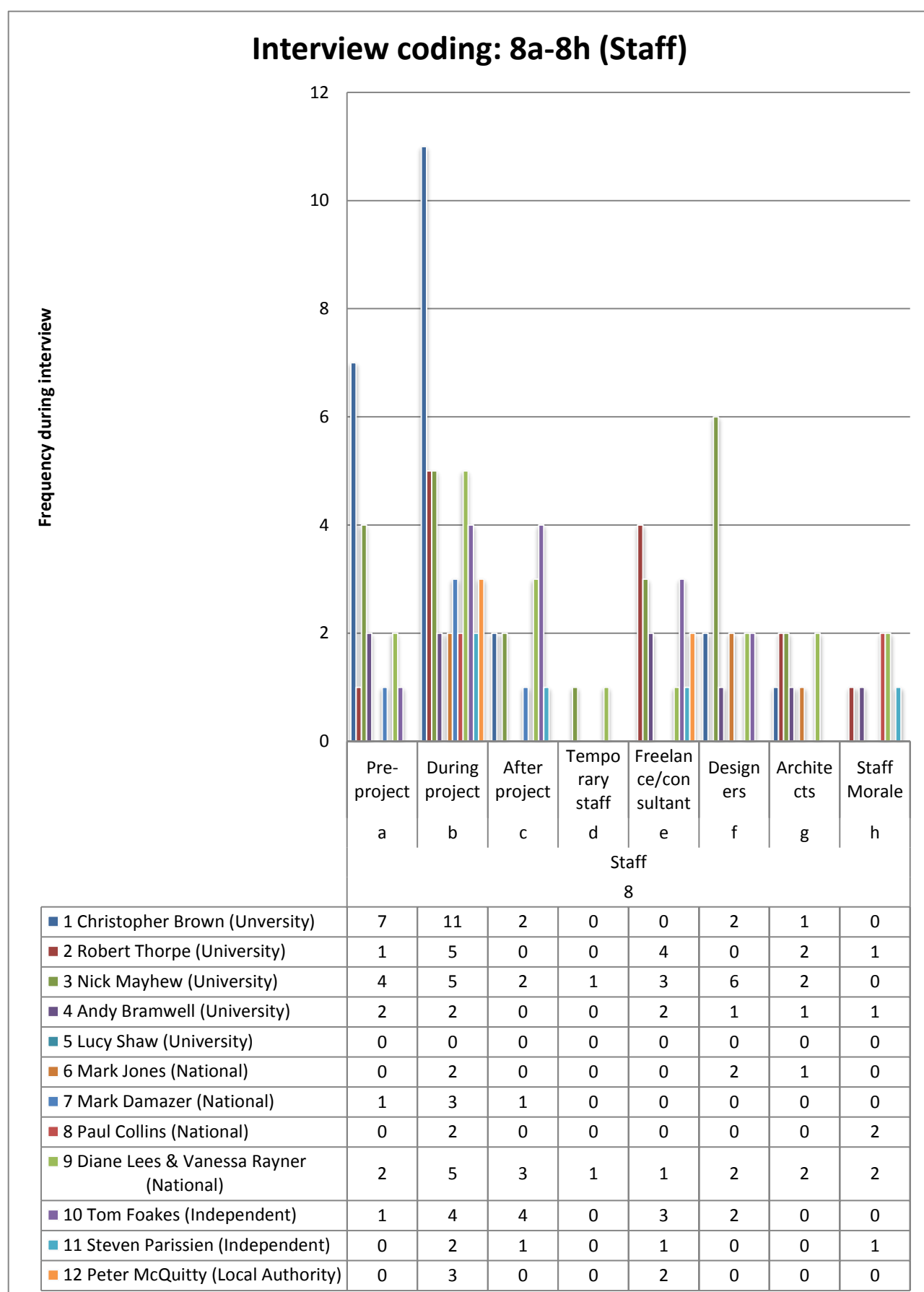
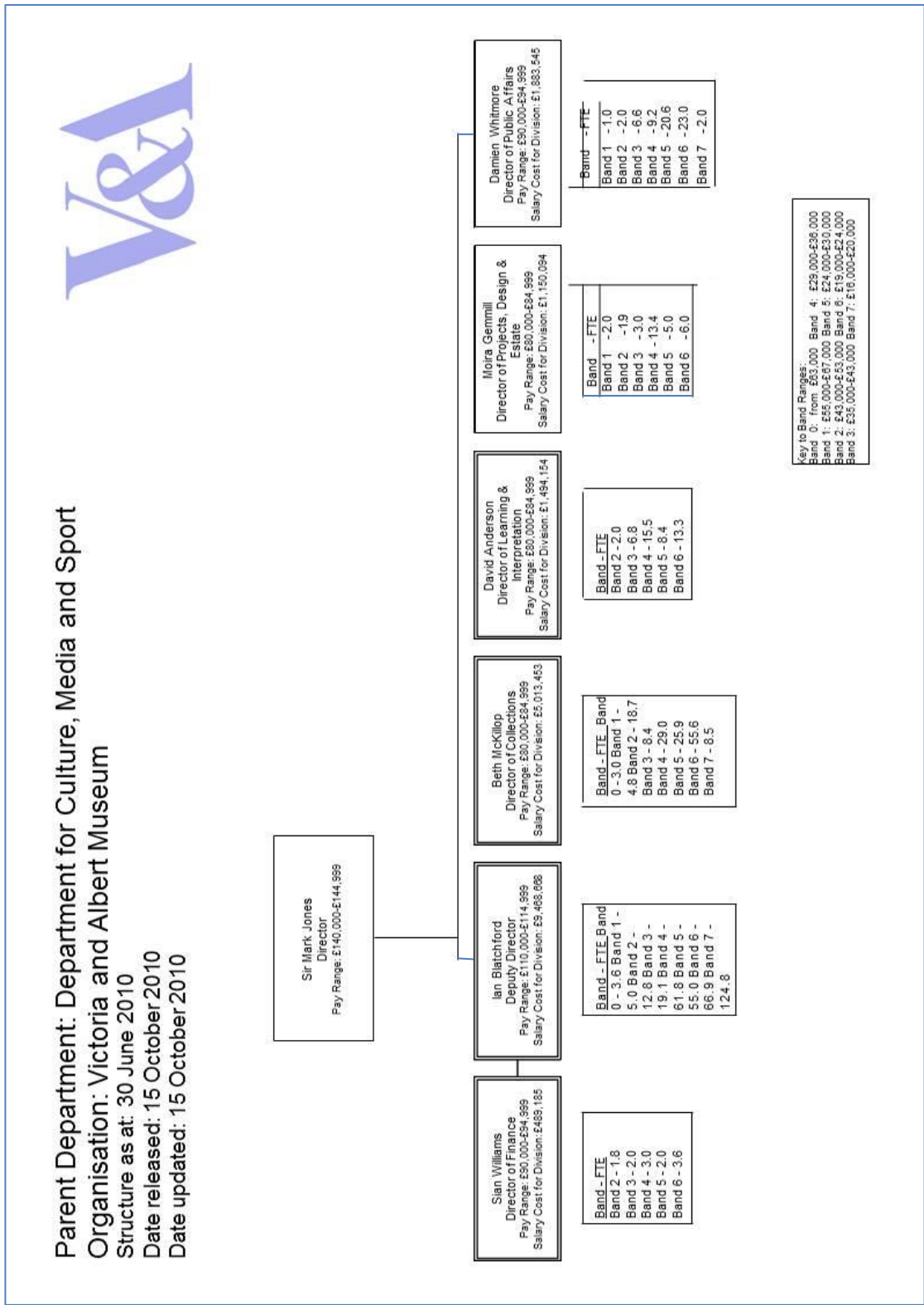


Figure 21.



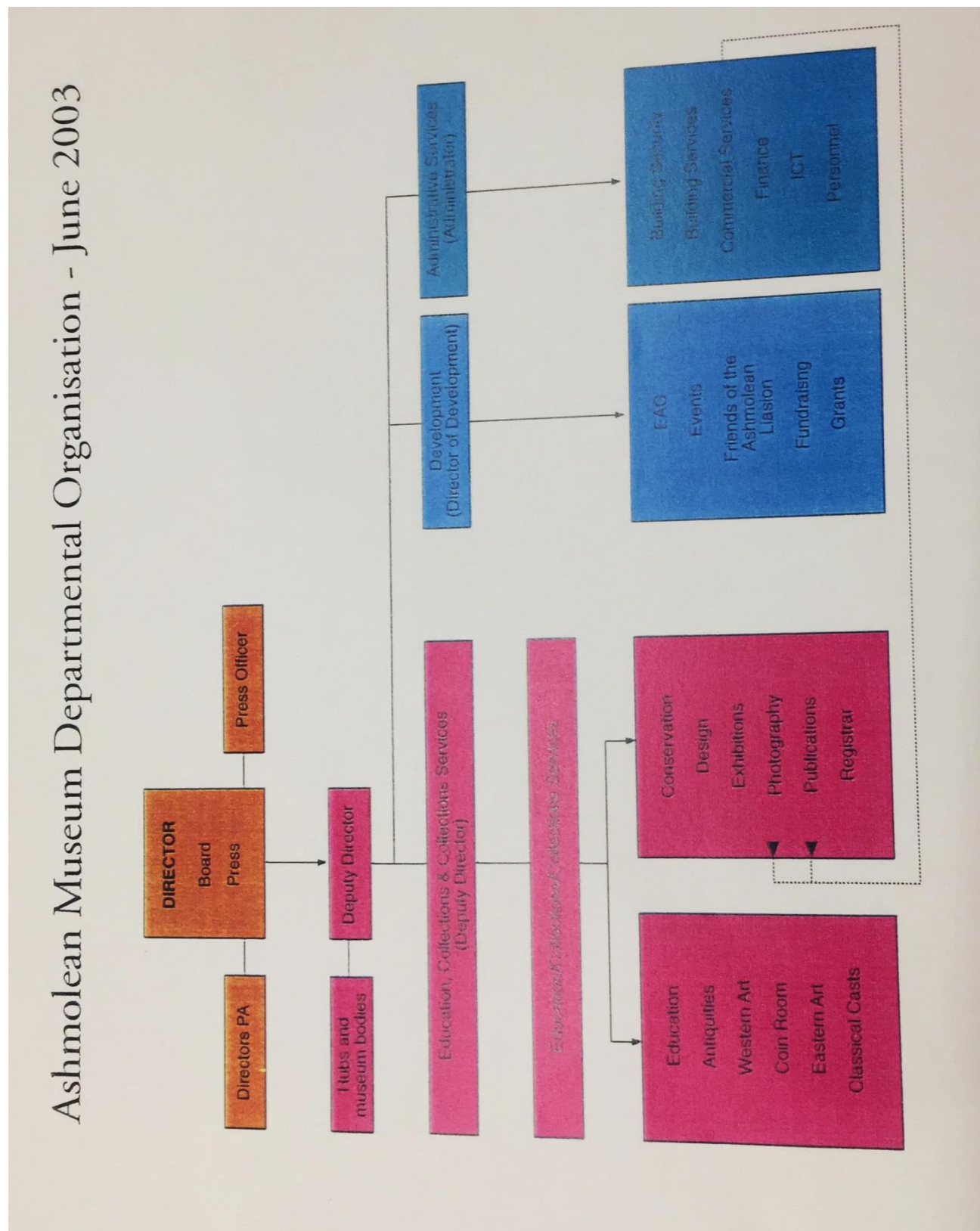
Appendix 5

Victoria and Albert Museum Organogram 2010



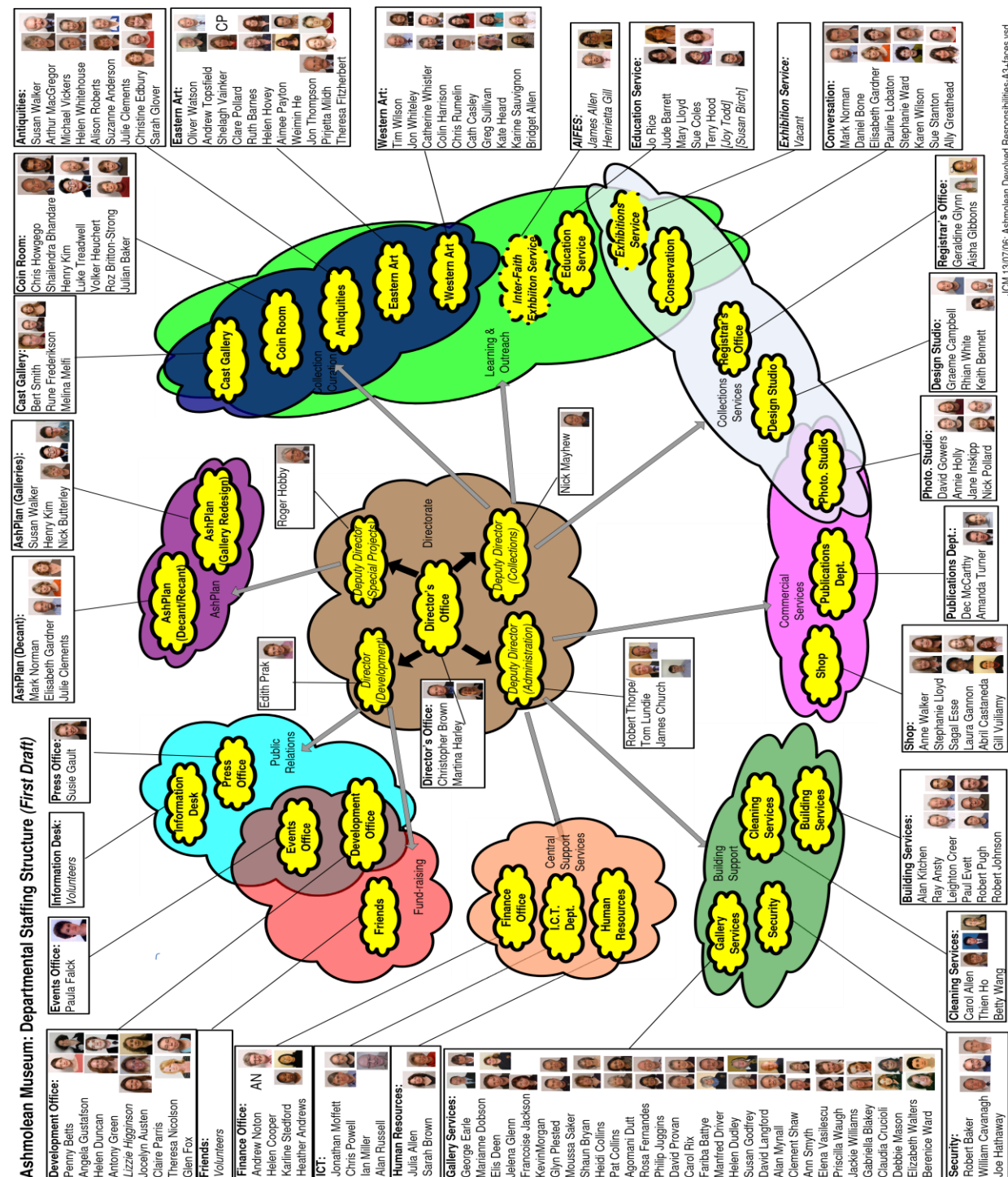
## Appendix 6

### Ashmolean Museum Organogram 2003



## Appendix 8

### Ashmolean Museum Organogram - 2006



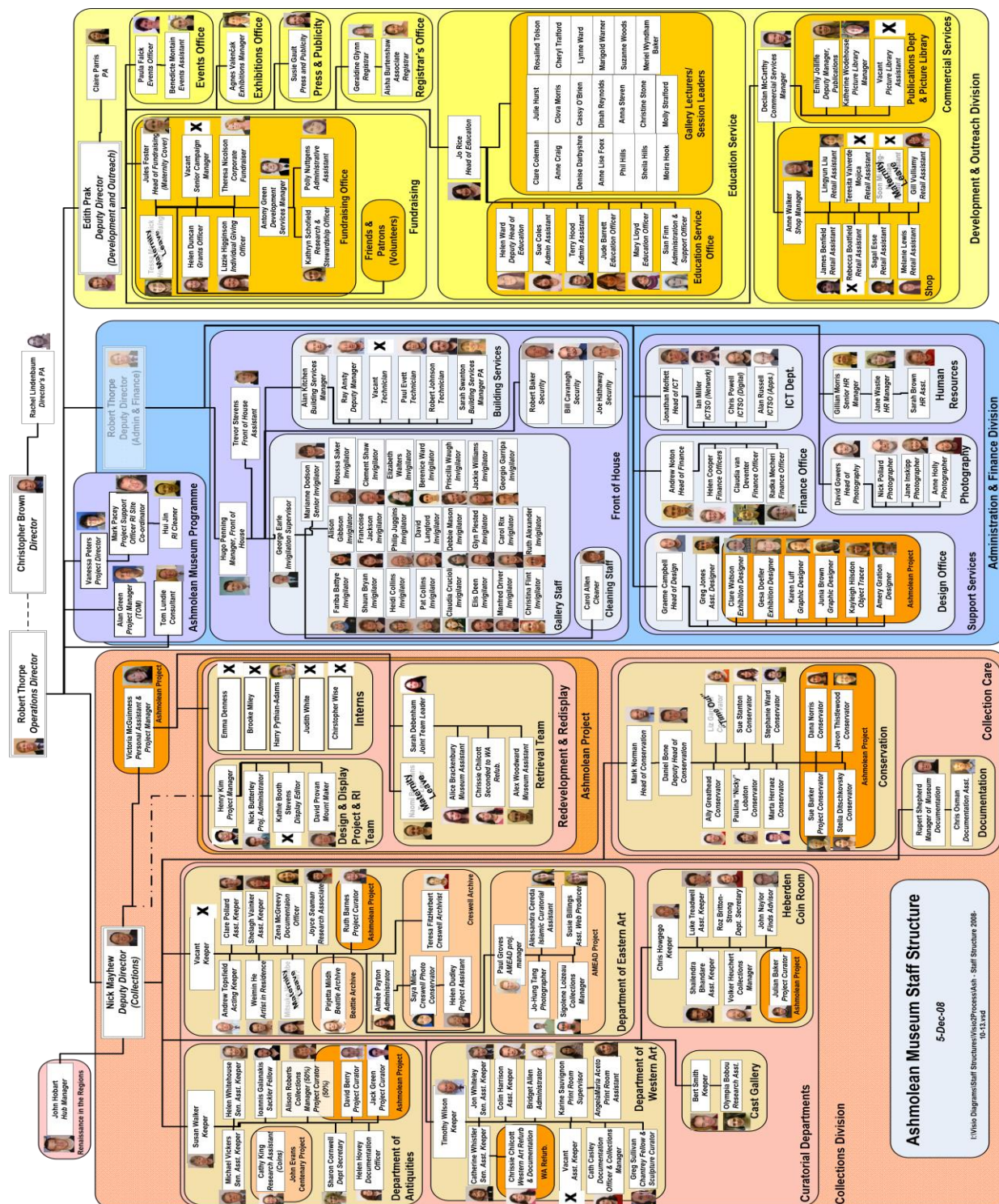


## Ashmolean Museum Organogram – 2007



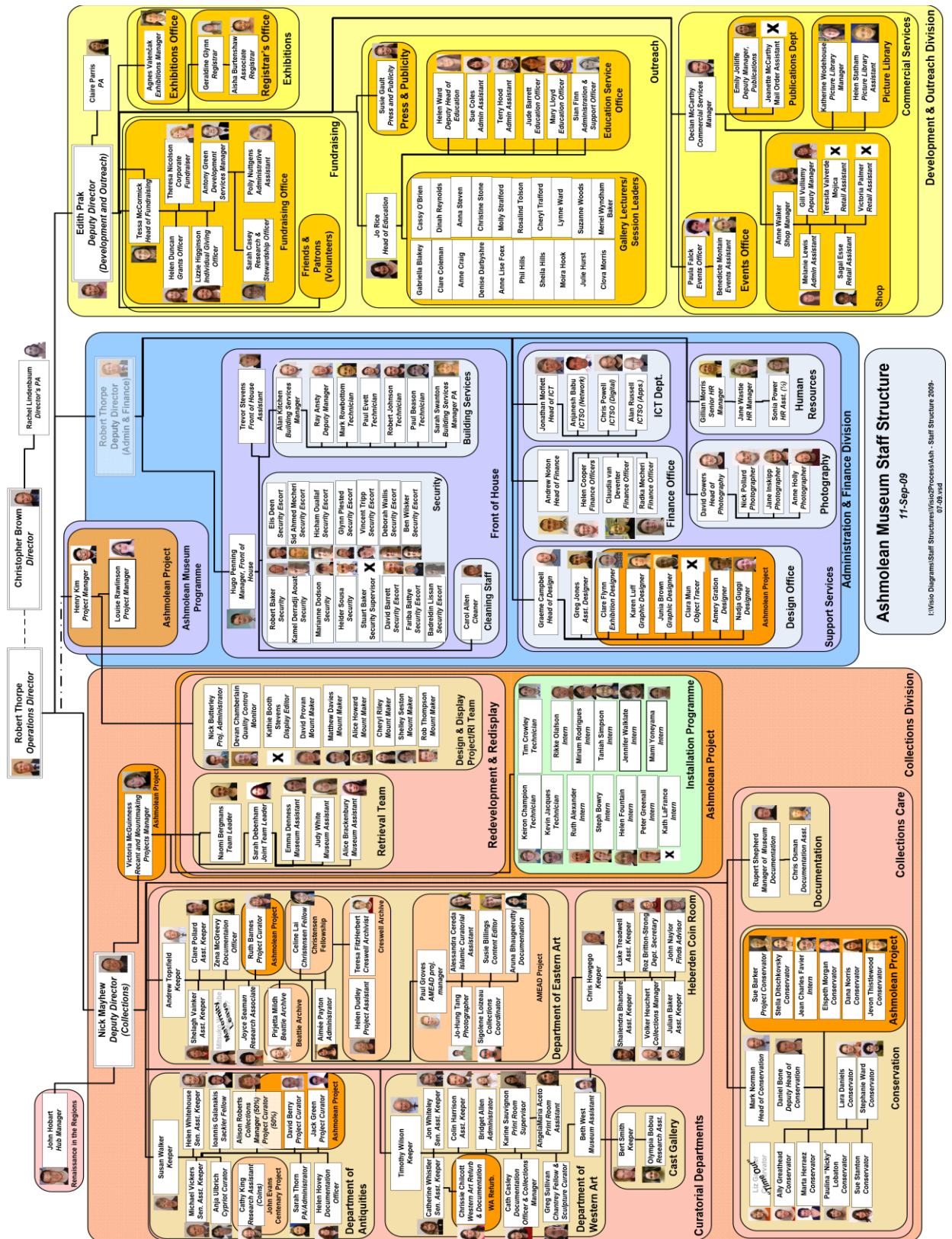


## Ashmolean Museum Organogram – 2008



## Appendix 11

### Ashmolean Museum Organogram – 2009





## Ashmolean Museum Organogram - 2010





## Ashmolean Museum Organogram - 2012



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Ashmolean 5: Family Survey – 2003

Ashmolean 6: ABL Cultural Consulting: non-user qualitative research – June 2003

Ashmolean 7: Strategic Procurement Report - 2003

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Ashmolean 9: Ashmolean Team Leadership – 2003

Ashmolean 10: Design team Project Organogram – 2003

Ashmolean 11: Standing Orders for University functional buildings and sites – 2003

Ashmolean 12: Architect Plan showing proposed new building – 2005

Ashmolean 13: Detailed Design and Production Scheduling document – 2006

Ashmolean 14: Design elements approval – 2006

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Ashmolean 19: Ashmolean Committee Structure – 2007

Ashmolean 20: Ashmolean Committee Timetable – 2007

Ashmolean 21: Letter from Cultural Innovations outlining proposal for project management services – October 2007

Ashmolean 22: Gallery Plan template – November 2007

Ashmolean 23: Interactive Policy – November 2007

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