

Museum Management Training at the Fine Arts Zanabazar Museum

UNESCO-Zanabazar Museum National Training Workshop – Ulaanbaatar, Mongolia, 8- 23 October 2007

COURSE GLOSSARY

(The complete Museum security terms vocabulary in 15 languages on <http://www.icms.icom.museum/> or on <http://elib.zib.de/museum/voc/>.)

Acid-free: A pH (acidity test) reading of 7.0 (neutral) or higher (alkaline) in a substance is a requirement for archival housing and storage materials, as acids can weaken cellulose in paper, cloth and board. Acids also weaken proteinaceous material.

Acceptable risk: A risk whose frequency and extent cannot cause a major loss to the organisation (e.g. damage of an object that forms part of a collection, health damage etc.). The level of acceptability, i.e. the extent of acceptable loss, is defined by the organisation itself on the basis of moral criteria and the laws and regulations of the country.

Access: (in the context of Collections Management, Security etc.): The process of controlling who enters or leaves a secure collections storage or study area, when they may enter and leave, and where they may go and what they may do after they are inside.

Access: (in the context of Visitor Services, Marketing etc.): Giving the general visitor or specialist the opportunity to use the displays, facilities and services of the museum, its research and study collections, and to meet staff: This also includes access at the appropriate intellectual level, and which is free from social and cultural prejudice.

Account: Individual record established for each category of asset, liability, fund balance, expense, or revenue.

Account payable: Debt or obligation due to suppliers or vendors for goods purchased or services rendered.

Account receivable: Money due to the organization from services rendered, donations or dues promised, grants awarded, loans made, or employee advances (not yet accounted for) due but not yet paid.

Acquisitions: Additions to the museum's collection, whether by donation, bequest, purchase, field collecting or exchange.

Advisory board (or committee): (a) Group of leaders with specific expertise responsible for providing counsel and advice to public service organizations. (b) Group of individuals, usually well known, influential, or prominent, whose public support and endorsement supplies credibility.

Advocacy: Investment in creating long-term relationships with the museum's current and potential future public. Having a loyal group of visitors and supporting local community can provide persuasive evidence to politicians, businesses and the press that the museum is a successful organisation and worth investing in.

Annual report: Yearly report, usually focused on financial or organizational conditions, compiled and published by the organization's leadership.

Appraisal (collections management): The authentication and valuation of an object or specimen. In certain countries the term is used for an independent assessment of a proposed gift for tax benefit purposes.

Appraisal (personnel management): The periodic review, usually annual, of an individual employee by a senior representative of the employer, which examines past performance and future responsibilities, and training and other needs.

Audit: (a) Process to examine the records, files, and accounting documents of an organization, to ensure compliance with internal revenue codes. (b) Examination of financial records in accordance with procedures designed to ascertain the validity and accuracy of the financials.

Board of directors or board of trustees: Two or more individuals serving as the governing body of an organisation.

Brand: A name, term, sign, symbol, or design, or a combination of them, intended to identify the goods and services of one seller or group of sellers and to differentiate them from those of competition (American Association of Marketing). In practical terms, a brand is the name, logo or symbol of a product or a service, including a museum.

Brand equity: Brand equity is the added value the brand gives to a product. It can be of enormous value for the manufacturer or the provider of a service. The consumers or audiences can give the brand positive or negative value.

Budgeting: A process of determining the allocation and expenditure of existing or potential financial resources of a specific period of time. The budget is developed at the conclusion of the planning process where it represents the prioritized allocation of limited financial resources to accomplish stated museum objectives.

Budget surplus or deficit: The difference between budget receipts and expenditure.

Accession (also Accessioning): The formal acceptance of an item into a collection and its recording into the holdings of the museum and generally includes a transfer of title.

Cataloguing: Assigning an object to an established classification system and having a record containing such things as identification, provenance, accession and catalogue numbers and location of that object in the collection storage area.

Charitable organisation: Term in some countries used to describe not-for-profit organisations.

Clandestine excavation: unlicensed or otherwise illegal digging or removal of buried antiquities or other cultural heritage.

Collection: An identifiable selection of objects having some significant commonality.

Collections care: A holistic approach to the preservation and conservation of collections that involves all aspects of the museum, from the facilities in which collections are stored and used to basic policies and practices and the education and training of staff-, collections care is the responsibility of all employees.

Collections management: Administration and care of collections with concern for their long-term physical well-being and safety. Includes issues of conservation, access and use, inventory and record

keeping as well as administration of the overall composition of the collections in relation to the museum's mission and goals.

Collection management policy: A comprehensive written statement that describes what, why and how a museum collects. It is a public document that articulates an individual museum's professional standards about collecting and care of collections.

Community relations: Initiation and maintenance of communications and interaction with the community at large and with specific constituencies.

Computerisation: The process of transferring manual records of any kind (particularly catalogues of collections, and financial, personnel and marketing records) to computer storage and management.

Condition report: An accurate, written, and photographic description of an object or document state of preservation at a moment in time and updated each time the object is involved in any activity, such as going on loan or put on exhibit. Assists in planning for conservation treatment.

Conflict of interest: The existence of a personal or private interest which gives rise to a clash of principle in a work situation, thus restricting, or having the appearance of restricting, the objectivity of decision making.

Conservator-restorer: Museum or independent personnel competent to undertake the technical examination, preservation, conservation and restoration of cultural property.

Consultant: Someone providing services to an organization (usually for a fee) in a capacity other than that of "employee."

Contract: An agreement enforceable in law.

Context: the micro - and macro-environment of an archaeological find and specifically the spatial relationship of objects to one another and their physical surroundings which may enable the scientific establishment of the temporal relationships, especially from soil strata.

Contribution (donation): Transfer of money or property without the expectation of material return.

Cultural heritage: UNESCO defines the cultural heritage as "the entire spirit of a people in terms of its values, actions, works, institutions, monuments and sites". Within this definition UNESCO recognises in particular:

- **The tangible cultural heritage:** including archaeological and other cultural sites, monuments, groups of buildings and whole historic cities, cultural landscapes, natural sacred sites, the underwater cultural heritage, museums, the movable cultural heritage of works of art and objects and collections of art, history and science, handicrafts, the documentary; digital and cinematographic heritage,
- **The intangible cultural heritage:** including oral traditions, languages, festive events, rites and belief, music and song, the performing arts, traditional medicine, literature, culinary traditions, and traditional sports and games.

Deaccession: The permanent removal of an object or collection from the holdings and records of a museum.

Design: An arrangement of forms and colours, or both, intended to be wrought out for use or ornament.

Direct marketing: Direct marketing are the promotion efforts that are directed towards a specified group or even specified individuals. While advertisements and public relations hit broad and uncontrolled, direct marketing is controlled and directed toward specific targets

Dealing: Buying and selling items for personal or institutional gain.

Documentation: All paper and other physical records and electronic records of information relating to an object or collection; the term is also used for the process of creating records pertaining to each object in a collection.

Due diligence: The requirement that every endeavour is made to establish the facts of a case before deciding a course of action, particularly in identifying the source and history of an item offered for acquisition or use before accepting it.

Designated funds: Funds set aside for specific purposes by action of the governing board.

Direct cost: Expense specifically associated with and identifiable by program, project, or activity.

Emergency plan: A document or other statement containing a written summary of measures and procedures used in accident and emergency management, i.e. a summary of planning, methodological and information documents used for decision making, management and co-ordination in such situations.

Employee: One who performs services for compensation and whose working conditions are set by the employer. Everyone who works for the museum, full-time and part-time employees.

Employee involvement: Process through which people exercise increased control over their work to improve the effectiveness of their organizations.

Endowment: Money not expended, but held for investment, with the earnings available for program activities, either generally or as restricted by the donor. The principal sum is kept intact, with only its income being expended.

Evaluation: Monitoring or assessing the extent to which a program or organization has met its goals and objectives.

Exhibition designer: Professionally trained person who creates forms and solutions to a structure or space for exhibition use. Someone who invents and prepares useful, decorative or artistic design.

Exhibition manager: Person in charge of the coordination of the implementation of an exhibition project.

Exhibition plan: Written description of construction stages of an exhibition.

Exhibition project: Written and drawn description of a proposed exhibition.

Expendable funds: Funds available to finance the museum's programs and services. That portion of fund balances not already spent on fixed assets and available for use in satisfying obligations.

Expenditure: Actual spending of money as distinct from the budget or funding allocated. In most government and accounting systems this is usually divided into

- **Capital Expenditure:** money spent on permanent or long-term assets, for example to buy, build, improve, or rehabilitate physical facilities or equipment, and
- **Revenue Expenditure:** all other current expenditure, such as staff pay and expenses, premises running costs and regular maintenance, taxes, transport, exhibit and collections expenditure.

Facilities management: Directing and overseeing the housekeeping, maintenance, and structural aspects of a museum; may also include architectural assistance, space utilization, or security.

Fiduciary: The relationship of a person to a museum where that person is bound to exercise rights and powers in good faith for the benefit of the museum.

Financial planning: A systematic process of assessing and matching an organisation's monetary needs and actual or potential monetary resources.

Focus groups: These are groups of 5-9 people drawn from the general public who are invited in advance to share and discuss their thoughts on issues or developments. They are increasingly used in museum visitor and market research.

Friends of the museum: Individuals and organisations legally separate from the museum itself, but which support the museum by giving time, and/or money to help the museum achieve its ambitions.

Fund: An accounting entity established to account for resources used for specific activities or objectives in accordance with special regulations, restrictions, or limitations. A Fund Group is a group of funds of similar character; for example, operating funds, endowment funds, restricted funds, and capital funds. Restricted Funds are those whose use is restricted by the donor for specific purposes, in contrast with funds that the organisation may use for any purpose it chooses in keeping with its mission.

Grant: (a) Financial assistance to enable implementation of a project or program based on an approved program, proposal, and budget. (b) Gift or donation received for either a restricted or unrestricted purpose.

Governing body: ICOM defines the Governing Body as "The persons or organisations defined in the enabling legislation of the museum as responsible for its continuance, strategic development and funding." The term is also used for any similar Board or Council established under other legally binding procedures or agreements, not requiring legislation.

Guidelines: Statements or documents clarifying rules. These may be changed by the issuing authority in accordance with new developments. They do not have the force of law.

Human resources: All of the actual and potential staff and volunteers that may be available to assist the museum in achieving its mission. This term, rather than the older term "Personnel", seeks to emphasise that the labour force is one of the most valuable (and usually one of the most costly) of all the museum's resources, and therefore needs to be effectively managed in the same way as other key resources, such as the collections and premises.

Illegal export: removal from a country contrary to its law. Income-generating activities: Activities intended to bring financial gain or profit for the benefit of the institution.

Information management: The process of managing the many different types of information collected, stored and -used by the museum, including collections and conservation documentation, fieldwork and other research records.

In perpetuity: Literally means continuing forever. This is used in reference to the curation of objects and documents by a museum for the entire length of an object's life.

Insurance: Coverage by contract whereby one party (usually an insurance company, but in some cases a government) undertakes to indemnify or guarantee another against loss as a result of a specified risk.

Inventory: A physically checked, itemised list of the objects in a museum's holdings. The terms Inventory Control and Location Control are used to describe collections management and administrative audit systems under which regular checks are made on each object, or a random

sample of objects, to ensure that it is still in the collection, and is in its allocated display or storage location. (See also Catalogue.)

Job description: A document analysing and describing the key features of each job in the museum, including its purpose, conditions of employment, key tasks and main responsibilities. These are very important in both the process of recruitment of staff, and in day-to-day management of existing staff.

Legal title: Legal right to ownership of property in the country concerned. In certain countries this may be a conferred right and insufficient to meet the requirements of a due diligence search.

Loan-in: The temporary loan of an artefact or collection from another museum, institution or individual to this museum, without a change of ownership.

Loan-out: The temporary loan of an artefact or collection from this museum to another museum, institution or individual, without a change of ownership.

Lux (abbreviation: lx): the metric (SI) unit of light intensity: 1 lux is 1 lumen per square meter. The light exposure of an individual museum object or work of art is now recorded as the intensity of illumination in lux multiplied by exposure time in hours. This longer-term exposure can be expressed Mega lux hours: one million lux hours (Mlx/h).

Market definition: Effort by the organization to determine and define which particular segment(s) of the market its operations, services, or products should be serving.

Marketing: The process of planning and executing the conception, pricing, promotion and distribution of ideas, goods and services to create the exchanges processes that satisfy individual and organisational objectives.

Marketing mix: This describes all the marketing tools the museum uses to achieve the marketing objectives. A common way of sorting the marketing mix is based on E. Jerome McCharty's "4Ps of Marketing": Product, Price, Promotion and Place. The "4Ps" emphasise that everything from shaping the product to the promotion is marketing.

Market segmentation: Dividing the market in e.g. geographical and/or demographical segments to sort out segments where the museum has optimal opportunities. These segments can then be chosen as target groups.

Minimum standard: A standard to which it is reasonable to expect all museums and museum personnel to aspire. Certain countries have their own statements of minimum standards.

Mission statement: A brief statement that summarises; the museum's reason for existence, typically including: who we are, what we do, for whom we do it, and why.

Museum: See the ICOM Code of Professional Ethics, Appendix 1.

Museum professional: See the ICOM Code of Professional Ethics, Appendix 1.

Museum security: The immediate capacity of a museum to fulfil one of its basic tasks, i.e. protect its employees, visitors, collections, other movable and immovable property and reputation.

Museum security system: Includes all technical means and organisational measures aimed at ensuring the required level of security.

Natural heritage: UNESCO defines the natural heritage as comprising natural features, consisting of physical and biological formations or groups of such formations, geological and physiographical formations which constitute the habitat of threatened species of animals and plants which are of outstanding universal value from aesthetic, scientific or conservation point of view, and natural sites or precisely delineated natural areas of outstanding universal value from the point of view of science, conservation or natural beauty.

Non-profit organisation: A legally established body, corporate or unincorporated, whose income (including any surplus or profit) is used solely for the public interest, typically for the benefit of that body and its operation. The term "not-for-profit" has the same meaning.

Organisational development: Process of analysing the formal and informal structures of the museum, determining needs and problems, and designing a systematic plan for incorporating appropriate, feasible changes into the structures to increase the overall effectiveness of service delivery by the museum or one of its programmes.

Organisational structure and infrastructure: Definition of the relationships, roles, responsibilities, and capabilities within an organisation.

Person specification: This is developed from the Job Description and identifies the qualifications, skills and experience needed in order to be able to do the job at the required standard.

Pilot project: Initial project designed and funded to serve as a model for similar projects meeting the same needs in other areas.

Planning: Devising methods through which to achieve an objective. Detailed expression of an action program to reach an identified objective, enabling a coordinated, shared effort.

Preservation (of collections): The reduction of any and all future losses to the collection.

Preventive conservation: Measures to maintain the collections in stable condition through preventive maintenance, condition surveys, environmental controls and pest management (as opposed to processes involving physical intervention, e.g. restoration).

Provenance: The full history and ownership of an item from the time of its creation or discovery through to the present day, from which authenticity and legal ownership are determined.

Policy deployment: Developing and communicating guidance needed to coordinate and execute activity throughout the museum to achieve common goals and objectives.

Public relations: Public relations are the deliberate, planned and sustained effort to establish and maintain mutual understanding between an organisation and its public.

Record keeping: Design and implementation of a system to collect management or program information.

Relative humidity (abbreviation: RH or RH): The amount of moisture vapour (gas) in the air, expressed as a percentage of the maximum possible at that temperature. This is usually expressed as a percentage of the moisture level of saturated air at a given temperature.

Risk (to the collections): Degree of danger of loss to the collections, whether total and catastrophic, or gradual and cumulative from any cause, whether natural or humanly induced, accidental or deliberate. Risk can be defined as a product of probability and consequences of the incident, i.e. Risk = Probability x Consequences

Risk analysis: A process in which the museum management identifies the frequency and seriousness of dangers threatening the museum (its employees, visitors, collections, other movable and immovable property and reputation). The outcome of risk analysis is the assessment of each of the risks - for the purposes of this chapter, on a five-grade scale: (a) negligible; (b) low; (c) medium; (d) high, and (e) catastrophic.

Security: Controlled access to premises for the public, staff and researchers to limit the opportunities for theft and destruction to collections.

Showcase (vitrine): Specially designed piece of furniture dedicated to display one or several objects.

Special events: Activities used to draw attention to the museum or to raise money, for example, exhibition receptions, open houses, and banquets.

Stakeholders: the various audience groups and others with a legal, financial or moral interest in the museum and its responsibilities and work. all those people who would directly or indirectly be affected by the action of a museum including employees, government officials, the local or national community, researchers and other museum professionals as well as the visitors.

Security management: Includes all management instruments, measures and procedures having impact on the level of the institution's security.

Security policy: A document or other statement defining, on the basis of risk analysis, the required level of the museum's security (the acceptable level of individual risks).

Strategic plan of museum protection: Includes all planned activities aimed at fortifying the organisation against various kinds of risks (ensuring security of the museum) on the required level and with clearly defined priorities

SWOT analysis: An analysis of the museum's overall situation, both of the organisation itself and the environment. Internal factors are analysed according to Strengths and Weaknesses, external factors according to Opportunities and Threats - hence "SWOT".

Target audience: The group for which an exhibit, exhibition or display is intended. organisation as the focus of its marketing, sales, or other efforts.

Teamwork: The coordinated effort and activity between several individuals in which each does a part.

Theft: a taking of property with the intent to deprive the owner of it.

Valid title: Indisputable legal right to ownership of property; supported by full provenance of the item from discovery or production.

Visitor - actual, potential & virtual: Actual visitors are the current audience of the museum, potential visitors are others within the same community or region who the museum may wish to attract in the future, while virtual visitors are those making use of the museum's information and other resources via the Internet usually through websites and on-line databases of the museum's collections and environmental records.

Visitor studies: Market research techniques and research which aims to collect information about visitors, their views and experiences of the museum, its displays, exhibitions and services.

Web: Popular abbreviation for the Internet-based World Wide Web information and communication system.