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## Managing the value of ecclesiastical heritage The experience of some Italian Dioceses

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**Keywords:** ecclesiastical and religious heritage; Diocesan Museums; Diocesan Museums' networks; Diocesan Museums' system.

### Abstract

This paper proposes to offer an empirical example of the valorization experience of cultural heritage related to some Dioceses located in Marches Region.

The research attempt is to demonstrate the boundaries and the opportunities of this project.

The paper is articulated in four main parts.

The first one synthetically shows the research and the literature framework as well as the different aims of the diocesan project.

The second part describes the steps of the work, the nature of the activities and the specific characters of the different categories of patrimony, the financial and human resources that are nowadays involved.

The third part includes a critical analysis of the managerial and operative process that has been adopted. What are the most important benefits? What is the best structure to govern "the network"? How manage the patrimony in respect with the religious aim of the ecclesiastic organization? Which option must be chosen? What are the most differences between this project and other private and public initiatives?

Finally, the conclusion illustrates the most important "outputs" of the project, that can be

considered innovative in the cultural context, and suggests some ideas, such as cultural enterprises, museum hubs (interdiocesan museums; museum of sacred art) and museum parks, that give people a versatile key to understanding, while respecting the different cultural and religious sensitivities.

## **1 - Introduction. The management of cultural goods: a quick theoretical view**

In the last decades the interest in artistic and cultural heritage has become more and more important in the socio-economic backgrounds of several countries. There are new aims (“must”) of public and private institutions tending to restoration, safeguard, valorization and to make cultural properties more usable than in the past.

To valorize art works means to “give value” and in the meanwhile “get value” from the artistic heritage, which is actually a difficult context for applying quantitative techniques and managerial theories compared to other economic fields. Indeed, speculations and incoherent management approaches are more frequent in the cultural framework because of the difficulties to apply codified ways of management.

The business economics, as a science dealing with the principles of efficacy and efficiency of the economical organizations, seems to understand problems and opportunities faced by cultural institutions and is now giving more support to the cultural management as well. (Di Maggio, 1986; Wynne, 1992; Boniface, 1995; Trimarchi, 1997; Zan, 1999, 2001, 2003; Greffe, 1999; Colbert, 2000; Jalla, 2000; Baldin, 2002; Montella, 2003).

Many discussions have been made upon the logic and techniques suitable for managing cultural organizations. On one side, it is important for these to be economically responsible and getting a compromise among plans of efficiency and efficacy is a good opportunity for increase. The current criticism sometimes is in opposition with the application of some managerial theories and shows methodology and merit problems.

Values and theories are embodied by artistic organizations with high specificity. The “technicalities” are connected to the nature of esthetical attributions as well as to scientific and professional ones of artistic and cultural world.

These concern mostly the internal dimension of contents and the nature of art works, but deal with the user’s link to arts and his attitude to use resources. The difficulties and/or the success of some cultural and artistic institutions show the importance of “humble” approach (Jönsson, 1996).

Precise operative and strategic choices (organizational, structural, financial) are required for managing cultural and artistic goods because of their particular nature. The most efficient solutions are often implemented and built up perfectly. So it’s almost evident the need of

adopting a contingent perspective, when situational, in applying managerial theories introducing trends of market and of resources through specific, not standard ways.

The management of ecclesiastical goods shows common elements with the management of cultural heritage and, in the same time, they look very different. The ecclesiastic institutions are trustee of a wide patrimony of historic and artistic expressions. This is almost true for Italy which is the cradle of Christian religion.

Churches and faith buildings all represent one of the most important sources of the historic and artistic patrimony of the World. Italy is one of the birthplaces and the seat of Christianity; during the centuries, it has been endowed by religious society with unvalued “gift”.

Even if late, in the last ten years a “rehabilitation process” has correctly and consciously recognised the role played by ecclesiastical heritage. This attention is due both to the interest of institutions towards this particular type of patrimony, and to the general attention of society and cultural operators with regard to Arts and cultural organizations.

From 1996 an accord between the Italian Minister of Arts and Culture and CEI (Italian Episcopale Conference) has stipulated a programme that covers all the Dioceses of the national territory. The principal aims of the programme’s actions (that involve the Regions and the Dioceses) are to evaluate the ecclesiastic and religious patrimony (cultural property with a religious interest) and to estimate its economic and patrimonial value. Above all, a census has been necessary to provide a framework for understanding the number, the different types and nature of the patrimony (fine and decorative arts, design, architecture, manuscripts, panel paintings, religious objects and cloth, furniture, etc.) in their appropriate historical contexts.

Since a few years, we have been assisting to the systematic recovery of a various types of cultural goods. Many projects of valorization and promotion of cultural and artistic heritage are still in course.

In this context, the valorization and the management of the Church patrimony brings to further censures or to new perspectives. The creation and re-organization of ecclesiastic museums and, particularly, of Diocesan Museums, is looked as a niche for tests and researches on managerial solutions.

## **2 - Reseach aim**

The aim of this work is to identify and describe the main factors of the valorization project concerning the Italian ecclesiastic heritage. This is specifically focused on finalities and manners as well on difficulties found out in the valorization process.

Particular concern is represented by the identification of guide principles and operative ways for building Diocesan Museums, as well as by the critical evaluation of this process compared to standard patterns (in terms of back office, demand side, supply side) assumed as samples for cultural organizations which are present in Literature (Zan, 2003).

Although there are still many steps to be made and results can not be proved at the moment, projects have been certainly implemented by some experienced Dioceses. This can be a good help for theory.

Is there any way to achieve results in terms of surviving possibilities and development of Diocesan Museums? In the context of Italian cultural organizations Diocesan Museums offer double alternative. From one hand, they care to be little structures and, from the other one, they tend to be strong on a national level.

In actuality the correct management of Diocesan Museums, and their abilities to make rules implemented are the surest ways for achieving goals. This means that Dioceses must be able to solve the many problems present in business administration, both operative, and strategic, and to apply rules of “good management”. It would be fine to get this approach during the planning activity and not later.

They should also identify the most suitable way for translating in operative terms the different aims of Diocesan Museums, giving premises for economy and efficiency and following the managerial principles to supervise the activities. They should also identify the most suitable juridical and financial rules and take care of the partnerships with other Diocesan Museums, local public authorities, firms, and further stakeholders.

In the whole, Diocesan Museums have to face many barriers but these obstacles do not discourage the lay or ecclesiastic staff of museums and do not fail to give them professionalism.

The aim of this research is to demonstrate the following hypothesis: Dioceses and ecclesiastic commissions are not used to managerial attitudes at all. However, they have been making great efforts to get closer to this mentality and sometimes their zeal has reached positive results. In other words, ecclesiastic organizations can also be good managers of museums, even if more noiselessly than other public or private cultural organizations by whom they are very often considered as minorities.

### **3 - Methodology**

Qualitative methods have been used to make this analysis. One particular technique has been the concise analysis of singular cases (case study).

The research has been made upon the valorization projects of cultural heritage in the Dioceses located in the following towns: Ancona, Camerino, Fabriano, Osimo, Pesaro, Senigallia, Urbino.

The test period is referred to the activities which have been experienced from 1998 to September 2004.

The project of these Dioceses are not equal but can be associated by several elements, such as professional inputs and standard laws. What is different is the duration and the articulation of the steps made and still “to be made” (some Dioceses have started earlier than others), the output of the project realized or to be realized (Diocesan or other kind of ecclesiastic museum), the kind of commission or corporation managing the museum institution, and the funds nature.

All the mentioned Dioceses are submitted to the guide dispositions signed by CEI (Italian Episcopal Conference) and have their own representative internally the Episcopal conference in Marches (CEM). This second level organization is a consultant body making proposals with controller skills. The decisional power is independent for each Diocese and makes reference to Bishops.

The activity articulates on four main steps: the description of cultural institutions, a short description of steps and activities, critical analysis of the valorization process and final comments.

#### **4 - The institution of ecclesiastic museums**

The force of the Church lies on memory. The announcement and the witness of the Lord has brought veneration towards the seats of cult and for sacral objects taken from Eucharist.

In the course of ages, several books and documents have been published by the Church to save and maintain cultural inheritances. Many dispositions have promoted the constitution of archives, libraries and museums.

Starting from the Vatican Council II the inventory activity of historic and artistic goods realized by Italian Dioceses has unlighted a wide various ecclesiastic patrimony. This work has given historic features to the Christian communities and increased the religious entity by showing the importance of structural approach aimed to conservation, valorization and public usage of historic and artistic heritage. The reasons of this commitment are due to the will of supporting Christian communities to be aware of their historic identity, and to the will of promoting the relationship among the different Christian communities and society, both on an individual and on institutional level.

The Church institutions charged of these cultural roles are the following: the ecclesiastic museum, the Diocesan Museum, and the sacral art museum.

The first one mentioned is actually the biggest category including the other two kinds of museums. The ecclesiastic museums make reference to the responsible Church and may belong to cathedrals, parish, monasteries, deaneries, religious institutes, confraternities. The same Diocese may include different ecclesiastic museums. Each museum contributes to the valorization of the heritage representing peculiar expression of local Church. Among the various types (collections, treasures, opens sacristies, permanent expositions) internally and externally promoted (cult seats, churches, cathedrals, oratories) and mostly marked by conservative aims, the museum seems to be careful for scientific research, the knowledge of the territory, of society and of local Church, as well as for the quality of the art elements and exposure seats, the “iter”, and the structure quality (professional staff).

*“The ecclesiastic museum is managed following precise rules about safety, promotion of events and training activities, and communication for the interest of religious, civil, scholastic and cultural institutions which might co-operate all together”.*<sup>1</sup>

The evolution of the institutional context and of contemporary museology, the frequent reminds of the Church and the CEI attitudes have allowed the ecclesiastic museum to get ecclesiastic identity which has also a cultural function.

The first is about the evangelic announcement. Through the art works the religious cult and the religious culture have promoted the announcement and the charity messages.

The second concerns all the conservative and research activities as well as the didactic usage of cultural goods. Cultural and spiritual elements are shared in the mission of ecclesiastic museum and this makes of the ecclesiastic museum an instrument of culture and announcement as well.

The museum of sacral art is an institution guarding Christian subjects which are referred to different times (ancient, medieval, modern and contemporary age). More than one museum of sacral art can be included in the same Diocese.

The last but not less important is the Diocesan Museum. This is one of the main institutions charged of the cultural properties management and showing the singular aspects of the Church fostering the knowledge of the Diocese. For this reason the Diocesan Museum is sole and represents the most important example of museum of every particular Church.

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<sup>1</sup> Pontific Commission for the Cultural Inheritance of Church, *“La funzione pastorale dei musei ecclesiastici”*, op. quot..

#### **4.1 - The Diocesan Museum**

The Diocesan Museum has a main role among the ecclesiastic ones. It is “*an instrument of Christian evangelization, spiritual elevation, dialogue with people from all over the world, cultural training, artistic usage, historic knowledge*” (Pontific Commission for Cultural Goods of the Church, “*La funzione pastorale dei musei ecclesiastici*”, 9th December 1992).

Since 1992 the institution of Diocesan Museum is recommended in each Diocese in a Document of Italian Episcopal Conference (“*I beni culturali della Chiesa in Italia. Orientamenti*”, 15th august 2001).

The Diocesan Museum has specific roles compared to any other ecclesiastical museal institution we can find in the territory.

First of all it has to acknowledge people to be aware of artistic patrimony of the country and, secondly, to support the commitment of ecclesiastic commissions towards safeguard activities and the valorization of their cultural properties. All the ecclesiastic art expressions which are present in the Diocese should be included in the mission of Diocesan Museum.

On the organizational side, as well as on the technical and scientific one for cultural and pastoral enterprises, the Diocesan Museum is a referent for all the ecclesiastic institutions conceived as system units or museum network, or complementary.

Then, the physiognomy of Diocesan Museum is ambivalent. On one side it is similar to the public institutions with regard to the cultural finalities of defence and promotion of artistic goods, on the other side it is different because of the pastoral structure based on the evangelic message of faith. This means that art expressions are considered not only artistically but also as instruments for transmitting religious contents to the visitors. As a matter of this assumption, the Diocesan Museum is not only an art “*iter*” but shows religious and didactic aims too.

These features have great impact on the dimensions of these institutions and on cultural enterprise. They have also effects on the historic and aesthetic dimension defending their particular identity, and on the trend of human resources owing professional competences. Effects are showed on the financial resources which bring to autonomy as well, and in the relationships among users made in the interest of customer’s satisfaction. Of course the relationships bring a religious message of solidarity.

#### **5 - The experience of some Diocesan Museums in Marches Region**

The Church in Marches Region reckons fourteen Dioceses in all. Among these, the ones in Ancona, Camerino, Fabriano, Osimo, Pesaro, Senigallia, Urbino, have started the valorization of

historical and cultural heritage from 1996 through an outstanding process aiming to the creation of Diocesan Museums.

At the moment only three (Ancona, Osimo, Urbino) of the above mentioned Dioceses have created a Diocesan museal institution. The other four, where ecclesiastic museums are also present, are still working to provide with the creation of a Diocesan Museum, which might be realized within one or two years.

Generally we can attest that three are the main steps which have brought to the valorization process of ecclesiastic property: planning and programming of projects; inventory of the diocesan heritage, cataloguing and creating an information data-base; building of museum institutions or re-organization of the existing ones.

### ***5.1 - First step: planning and programming***

The first step finished in 2000 with the end of the Jubilee Year. This made possible to get the pre-condition of the whole process: the assumption of strategic way in the new role of ecclesiastic goods and the identification of Diocesan Museum as a relevant instrument of their maintenance, valorization and promotion.

In the same time it has been clearly identified the triple function of Diocesan Museums: pastoral, cultural and even economical. Aims and purposes have been put on a long duration plans articulated in short ones. Each Diocese, even though in the full respect of its autonomy, has followed the guide lines supplied by the national and the Regional Episcopal Conference and by the association of Italian ecclesiastical museums (AMEI).

This step has been marked by a strong relationship activity which has involved the main categories of stakeholders: Bishops and other diocesan responsables of the Region, members CEI of the Church; political and administrative local institutions (Region, Province and Commons), financial (Foundations, Credit Institutes and other financing members) and cultural (Superintendence).

This trade activity has generated a multitude of formal and informal agreements. The attitude to the local dimension of Diocesan Museums as well as the aim of public, ecclesiastic and territorial advantages, have supported the participation to cultural projects and of members who benefit from cultural and pastoral roles in Diocesan Museums.

Always in this step a positioning analysis has been made identifying force vs. weakness as well as boundaries vs. opportunities of cultural ecclesiastical institutions.

Each Diocese has provided to evaluate the condition of Diocesan Museum (where already existent), of other ecclesiastic museums, human and financial resources, skilled professional, relationships between actual and potential interlocutors to share the project with.

An important goal was the definition of a normative referent frame, whose main sources are: the Vatican, the CEI, the Italian Republic, the ICOM.<sup>2</sup>

Indeed, the first Diocesan Museums arose between the end of 19th century and the beginning of 1900 while no definite normative frame was present, nor financial support. In 1974 the CEI recommended its constitution and recognized officially the tutelage and valorization aims. The Diocesan Museum and its content of works was no longer considered as a collection of sacral arts to be saved and maintained, but as an actual institution for the knowledge and the valorization. In 1992 a Document of the XXXVI General Assembly of Italian Bishops<sup>3</sup> supplied the most significant normative reference.

This goal also increased the Cultural Project promoted by the Italian Church, which was accelerated by 2000 Jubilee too, and marked the passage to a new period: the creation of a protection net of Diocesan Museum value and the consciousness of its purposes. In this way it has been possible to apply a strategic approach for lasting development of the institution and of Diocesan Museum management.

In August 2001 a circular letter issued by the Pontifical Commission for the cultural heritage of the Church has exhaustively pointed out this theme. Purposes have been established as well as the nature and the types. In the meanwhile this communication has made remarks upon the institutional regulations and organizational and managerial modalities.

The observed museums of Dioceses in Marche are based (and will also be started) on a statute and are regulated by special rules. An organizational asset concerning roles, capabilities, competences and functions (director, museum Commission, Administration and financial board of directors, secretary, archive, safety staff, visitors rules and so on) has been planned already.

The Dioceses in Marche try to conceit the Diocesan Museum as a systemic organization, rather dynamical, to be faced by entrepreneurial management based on a strategic pattern. They have understood that the matter is not only to build a museum but to mind living purposes too. They showed concern on planning and programming the development of the museum, as well as defining rules according to the standard institutional and organizational obligations of museums.<sup>4</sup>

This development is based on the skill of spending and generating resources through different

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<sup>2</sup> The ICOM (International Council of Museums) normative establishes features (permanence, institution, no-profit aims, enjoyably for visitors, social services), typologies of museums (“office museum”, “limited autonomy museum”, “independent museum”), deontology code ref. to the purchase of collections and of management of museums (elementary parameters, rules, juridical obligations, funds, staff, public access, staging manners, sponsors).

<sup>3</sup> “I beni culturali della Chiesa in Italia. Orientamenti”, National Office for Ecclesiastic Cultural Goods, 9<sup>th</sup> Dicembre 1992.

<sup>4</sup> Standards for Italian Museums, 28th September 1999.

means, such as the adoption of a suitable strategy of communication among local interlocutors, a careful financial management, an adequate accounting and control systems, the sharing of new professional skills and the inserting of museums in intra and inter-diocesan networks.

## ***5.2 - Second step: inventory, catalogue and establishment of an information system of ecclesiastical goods***

The second step of the project involves five Dioceses among the above mentioned ones. The activity is mostly focused on the long and hard work of inventory and cataloguing acknowledged by the diocesan heritage.

The inventory of ecclesiastic goods is required by the canonical right code (can 1283, 20). Compared to the church inventories filled by the priests singularly and forwarded to the courts, the ecclesiastic inventory started on 1996 seems to be radically innovative.

Since 1996 the CEI has been promoting and co-ordinating an entire project on national territory helping 8 per mille institution. The agreement between the State and the Church of 13 September 1996 for saving and maintaining cultural properties, was a great input for the constitution of a diocesan office, sacral arts and cultural goods as well for the statute of Diocesan Commission and of Regional Consult (circular 1 of the National Consult for Ecclesiastic heritage).

In this context the inventory has become an operative instrument, able to provide a detailed report of the artistic goods and their personal properties too, in order to preserve and to increase the ecclesiastic and religious patrimony and to generate occasions of study for further researches. This is also useful for the researches of authorities to grant protection to the cultural Heritage when necessary.

During this activity much importance is given to the goods which are considered “at risk”, for instance drawings, sculptures, silvers and furnishing.

The data-base using the software S.I.C.E.I. follows the standard for filling ICCD, even if integrations or variations have been introduced by CEI for ecclesiastical needs, such as the holy function bringing to the “liturgical usage”.

Each Diocese has produced a project of census including the file of the buildings to be territorially assessed, a financial plan, an organization chart of collaborators and roles (co-ordinator, scheduler, photographer, software-man, and supervisor) as a support for the technical and scientific diocesan managers. A variety of specific skills are required on the identification of materials and techniques for cataloguing works of art, but specific economic and financial capabilities are required as well, and attitude to manage the different relations with the partners of the project.

The confirmation of the National Office for ecclesiastical heritage is followed by the delivery of the inventory from the Bishop to the supervisor (Superintendence) concerned or to the parish priests.

While in many Dioceses the activities have been started only formally, in these Dioceses works have been almost concluded. Particularly, the Dioceses in Pesaro and Ancona have finished their census activity and are waiting for the formal confirmation of schedules by the national office for ecclesiastic goods. The vision of these lists is based on suggestions and comments made by the office in case of contrasts with the ecclesiastic rules (manual 3.1, dated July 2004).

For this activity as well for cataloguing the Dioceses have taken their professional resources through two main solutions: by the commission of work in the hands of external recorders or offering professional opportunities to specialized fellows, thanks to the training experiences made in the Dioceses or promoted by other regional or national ecclesiastic institutions.

In the first case they have selected art critics regionally known and affirmed, and afterwards they have charged other collaborators for the creation of information system data-base. Specifically, they have trained members of a team for cataloguing, mostly young people with degrees in Humanities and socio-artistic subjects, living in the Region and hopefully belonging to the same Diocese. These have managed the whole process of inventory (both manual and computerized).

Other professional resources are photographers (for the photo-scheduling), co-ordinators (one lay for each Diocese), and external scientific responsables.

The activity of recorder has occurred under the supervision of a diocesan coordinator (lay or ecclesiastic) and an external manager (one supervisor for each area).<sup>5</sup> The first is concerned with planning the visits by the seats holding the ecclesiastic goods, and represents a diocesan opposite in the relationships among collaborators and other external interlocutors; the second guarantees the actuality of schedules.

The inventory also brought to a series of inspections in all the sacral seats (such as churches, cathedrals, parish and religious institutes) owned by the local Church.

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<sup>5</sup> The Dioceses from Marches Region regret the lack of specialized technicians who know the history of Art and the pastoral function of the Church too. The affirmation of new professional skills (technical historians of art and of cultural patrimony, technician for communication and promotion of cultural heritage, ...) is required by the regional project of Marches (D.G.R. 1495 02.09.2002) "The museums and the commissions towards quality assumed standards. Insert of young people in the market and in the preventing approach in the field of cultural goods". The care of human resources is also one of the most qualified standards in the ministerial documents (d. lgs. 31<sup>th</sup> March 1998, on the criteria scientifically proved and on minimal standard to be observed in the management of museums).

They were OA (opera d'arte = art works), that is ancient textile, silvers, ligneum objects, paintings, furniture and sacral objects as well. Some Dioceses have made the inventory on other goods of historical and artistic interest such as printings, musical instruments, frescos.

The entity of the heritage, which was almost unknown to the Dioceses, is actually quite relevant. The rebuilding also restored the situation from precariousness and brought interventions for restoration and maintenance.

As a consequence of cataloguing we have three different kinds for filling information: inventorial, pre-cataloguing, and of cataloguing<sup>6</sup> (classified and illustrated catalogue).

Even today the data-base of the heritage is used by local public institutions and national ones (Region, Minister, Superintendence, the Cultural Minister) as well as by other cultural and scientific institutions (University, Research centres).

Among the seven Dioceses in Marches the one of Pesaro has been the first one on a regional level to make the cataloguing phase finished and has been included in Marches II, a ministerial project financed by the Region.

The catalogues immediately generated revenues. Indeed, the Diocese has ceded the catalogues to the Region and Superintendence behind revenues. In other words, the Diocese in Pesaro found out the way to get the economical valorization of cultural goods through the income obtained by the cataloguing activity. This example will be probably followed by the other Dioceses from Marches as well.

### ***5.3 - Third step: constitution of museal institutions or re-organization of the existing ones***

With the last step of this project we get in touch with the real operative and strategic management of museal diocesan institution. At the moment only three out of seven Dioceses have reached the goal as mentioned. On the other side all the other Dioceses have still to get improved. Among the seven Dioceses considered in our research, three Dioceses have already built up a museum or started a museal activity. The other Dioceses are going to start only now.

Here below we will try to explain the most problematical matters which have already been solved or should be shortly over thanks to work of Dioceses.

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<sup>6</sup> The inventory catalogues are issued for heritage aims and for attesting the goods property. Pre-catalogues lists include the subject (description of the subject, reason of the attribution of date) and are considered as a high expression of scientific level in the documentary and socio-artistic analysis.

## **6 - A critical analysis of managerial problems in the valorization process of diocesan cultural and artistic heritage**

“To be an ecclesiastic museum is just more than being a museum” (Grumo, 2004). Together with the richness of the mission contents there’s a high complex management of Diocesan Museums that makes the difference with any other museum. The complexity of the diocesan management is both on the operative and on the strategic level and it is mostly due to the following factors: the pastoral and cultural aims together with the economic goals to be reached, the many operative declinations and the referent underground which is quite complex.

In order to achieve a real development in the diocesan communities the ecclesiastic museum should be lasting and free on the decisional side. These aims require a management style and management theories inspired to the efficiency criteria as well as to professionalism in the action of museums. This is the approach for a “good management”.

The main difficulties of the arising Diocesan Museums can be summed up in the following way:

1. to reach conditions of financial independence. In fact one of the main risk is the financial dependence of Dioceses to connected parish churches. Each museum should be able to hold on its development by itself, with the consequence of stopping or reducing its activity;
2. to avoid any dependence from public financial supports. The systematic help of financial members such as the Region, the Provinces or even the Commons may cause the loss of decisional autonomy and in this way the museum activity could be easily taken off by the public sector. The collaboration and the financial concern of the public institutions should not compromise the decisional autonomy, since the heritage and the aims of Diocesan Museums are not the same of public ones. At last they can be considered as complementary ones to the public aspirations;
3. do not consider only the artistic and pastoral function of the museum. The “back office” dimension should not mortgage the human and financial resources which might be sufficient (for entity and composition) to cover all the crucial areas (“demand-side” and “supply-side”) concerning the museum institutional activity. The problems of the aesthetic and historical sphere, as well as the pastoral one, do concern the specific museology dimension and are connected to seats, collections, buildings, maintenance criteria, restoring and cataloguing, but with the same impact of financial and competitive ones;
4. to adopt fiscal and accounting or juridical rules suitable to implement them properly. This is to avoid sanctions or exaggerate links;
5. to be able to identify external collaborators professionally skilled and maintain suitable

control on their work. This concerns structural choices and the way resources are used in Dioceses. The Diocesan Museums in Marches Region are looking forward to adopting an economization pattern for saving human resources. The responsables of the project (Bishops, coordinators) are trying to move into an entrepreneurial attitude for choosing their collaborators, decide staff competences, and whether ask for external resources or internal ones. They also have to evaluate the financial participation to the project;

6. to invent and realize projects ensuring lasting process of development. This deals with the relationships among users and more generally with the stakeholders and other Diocesan Museums.

### ***6.1 - Some possible operative and strategic choices***

#### *1) The historic-aesthetic dimension*

The canonical normative requires the organization of Diocesan Museum (structure, library, archive) and its ecclesiastic and pastoral usage. In the Dioceses which are above mentioned these guide lines are put in comparison with other proposals<sup>7</sup> of taxonomy of museums, distinguished in exposition rooms and services rooms (laboratories, communication services and so on), warehouses, reading rooms, account departments, operative rooms etc.

#### *2) The juridical pattern*

The juridical configuration is made of three possibilities: constitution of a new legalized religious foundation; religious and cult foundation already existent and recognized by the law; constitution of a new canonical foundation which is not autonomic in the Diocese. In all cases the constitution of a Diocesan Museum occurs under the Bishop ordinance.

The Bishop is the direct responsible and the one who gives the Diocesan Museum to a managing unit. Usually it is a religious entity or cult (ecclesiastic entity)<sup>8</sup> which is officially legalized. The Diocesan Museum in Pesaro will probably take the configuration of a new legalized religious foundation.

The aim of the foundation<sup>9</sup> is to promote the Christian culture as a faith witness, also for

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<sup>7</sup> For instance, the one suggested from R. Dober, F.A. Waidacher. This proposal has been adopted as a work draft on the International Committee on the Architecture and the Technology of ICOM, whose final and integrated version is still in course.

<sup>8</sup> The ecclesiastic commissions that are recognized by the civilian law are: Dioceses, parishes, religious institutes, seminaries, cult foundations. They are originated from the canonical order, are seen as juridical fellows with civil effects with DPR (122/1985) and must belong to the RPG and the Prefecture (UTG). The statutory rules of commissions belonging to hierarchic constitution of the Church is contained in the Canonical Right book.

<sup>9</sup> The foundations (religious or cult ones) need to get their own statute approved by the Bishop. The statute of the foundation must consider: the denomination, the nature, the aims, the patrimony, the government organs (Board of Directors, President, Auditors), rules for modifications of the statute and breaking-up. The Board of Directors, must be composed by Bishops and four members with cultural and account skills as well as

increasing clerical and religious concern (ref. Art. 12 L, 22/5). The foundation can be given to the historic archive and the library, and might collaborate with similar religious or lay entities for achieving the established goals. Its property (including the furniture and eventually the seat of the museum, while museum collections are not in) must follow the principle of sufficiency for reaching aims. The foundation takes its economic means from the heritage revenues, presents, gifts and oblations.

If it is not possible to create a religious or cult foundation the management of the Museum can be committed to an existing entity (the Diocese). This is the case of the Diocesan Museums in Ancona and Osimo. In this case it's possible to create a canonical foundation which is not autonomic and charge a commission with the Museum management activities.

The foundation of the Diocesan Museum is not civilian; its duration can be 25 years at last and follows obligations establishing the aims and the property. This foundation is directed by the diocesan administrator with particular concern to the annual budget of the Diocese. A commission of three members controls the addresses of the museum.

### 3) *The funds raising activity and the financial management*

As already said, an entrepreneurial attitude has increased among Dioceses to avoid the problem of financial resources lack and get funds. They try to distinguish between private and public funds and are looking for a proper management of choices for investing and addressing resources.

To the private stakeholders represented by firms, foundations, category associations, are requested both structural supports for the creation of museal institution and the collaboration to specific projects (f.i. the management of events) or special agreements for plans, as for long duration promoters. The financial interventions made by privates show the attitude of these opposites to get strong connection between the project and the territory.

Among public interlocutors, the Region plays a great role.<sup>10</sup> Financial resources can be granted by the regional competences for cultural goods and the organization of the museal and library activities of local interest. Diocesan Museums and generally all the ecclesiastic ones are included in this category.

The intervention of regional and local government units is required, both for collaborating

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juridical ones, endures five years. It has got the role of planning and actualize initiatives, make rules (diocesan rules) and approve preventive and consumptive budgets. The collegial order of supervisors is based on three members pointed out by the Bishop. This has a control function and must check if the foundation is properly administrated. An annual report is forwarded by the collegial order to the Bishop. All the charges are for free, excepted the refund for expenses made.

<sup>10</sup> Art. 116 and 117 D.P.R. 14<sup>th</sup> January 1972, n. 3, ref. to the transfer of accountant functions to Regions and to central or peripheral commissions concerning museums, libraries and local cultural organizations.

to the local interest of Diocesan Museums, and as opposite parties in the agreements with local ecclesiastic authorities.

#### 4) *Museal links and diocesan system*

In a cultural context which is more and more complex competitors are always much stronger than Diocesan Museums. The customer satisfaction is necessary to exploit the potentiality of economical activities and not only economic ones. This recommends also to provide with integrated and innovative services.

There are different alternatives for this such as: religious and cultural tourism, or participation to tourist districts. The Dioceses from Marches are addressing, even though the passage seems to be hard, towards the pattern reminded by the Italian Episcopal Conference: the network of Museums or the Diocesan Museums' system.<sup>11</sup>

The co-ordination between ecclesiastic Italian museums is very important to get critical consciousness which might reduce the mediocrity and achieve professional skills. Such elements are necessary for the management of Diocesan Museums in front of State, Provinces, Regions, Commons and for the local or even National Catholic Community.

The network or the system allows the promotion for suitable usage of cultural heritage which is "lost" in the different seats and use this capillarity as a strength point in society.

The museum network can be realized on two levels: intra-diocesan network (internal network) or inter-diocesan ones (external network).

The plan of intra-diocesan network aims to generate cultural links between the Diocesan Museum and the parish museums, while the one of inter-diocesan network between Diocesan Museums and other units of the same territory offering internal auxiliary services (cleaning, administrative and book-keeping services, marketing and so on). This is also including back office support activities and resources (such as funds commissions, voluntary groups, entrepreneurial commissions for financial and commercial activities, f.i. bar, room rentals, or even the organization of tourist journeys), and tries to fit linkages between the coordination of activities in Diocesan Museums and the regional or national initiatives, as well as with other Dioceses from Marches sharing with them commercial activities.

Both networks might be informal without a specific agreement (they can also be based on conventions only), but should at least guarantee a good level of flexibility.

The new trend is to avoid that each Diocesan Museum is configured as a single institution,

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<sup>11</sup> About the origin of museums net of diocesans, with particular reference to the experience of diocesan nets in Umbria, to the example of Diocesan Museums of Milano, Padova, Susa, we can see the contribution of C. Tatta, P. Biscottini, A. Nante, G. Popolla, M. Grumo, in "Le problematiche gestionali dei musei ecclesiastici", pagg. 229-309.

otherwise the business force would be missing, while the aim of Diocesan Museums is not only preserving but giving value as well.

The access to common services, even through the collaboration of profit or non-profit subjects, make accessory and support services increasing activities and finances in the same way as the institutional ones. This allows also to supply traditional or innovative services which are hardly offered by museums.

This strategic framework is not easy to be realized as Dioceses in Marches Region are still facing many difficulties which are mostly due to a multitude of factors: the different work levels and the parochialism caused by cultural differences of local environments, the opposition made towards the new proposals requiring the sharing of aims and values, and not less important, the need of a strong work after the cataloguing and inventory phases.

Nevertheless, this development has been representing the main goal and reflection pole for Dioceses since a long period, even is not immediate, and considering the successfully experiences of other Dioceses of the Country.

As a support to the reticular model we have the ability of following and sharing a solid strategy for relational development which might exploit synergies, complementary features as well as the specialization on singular diocesan museal institutions and of other groups which are present in the context. This draws up the attention on the creation of a common referent centre acted to develop planning and programming on a corporate level and support other participants' activities as well (aims definition, activities, projects, expenses and income resources).

The instrument which may be a guide commission on this role could be also for our Dioceses the constitution of a Regional Ecclesiastical Museum Association, put as a second level organization compared to the National one (AMEI) which is already operating by CEI. A federal mechanism for generating a focus member of the net would allow the definition of common criteria for sharing costs and contributions in each ecclesiastical group belonging to the federation.

As a forecast of medium-long period, this second level association would embody representative functions of the associated, and would be a support for the start-up of new institutions as well as for a coordinated promotion among museums and rogation of supporter institutional services,<sup>12</sup> f.i. through social promoters<sup>13</sup> or, in the cities of art, provincial or citizen committees, parishes, or religious institutes or even other ecclesiastical museum

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<sup>12</sup> For example guides, training meetings, high scientific volumes, multimedial ways, didactic activities to schools and aged people, publications, conferences, restorations, and other projects.

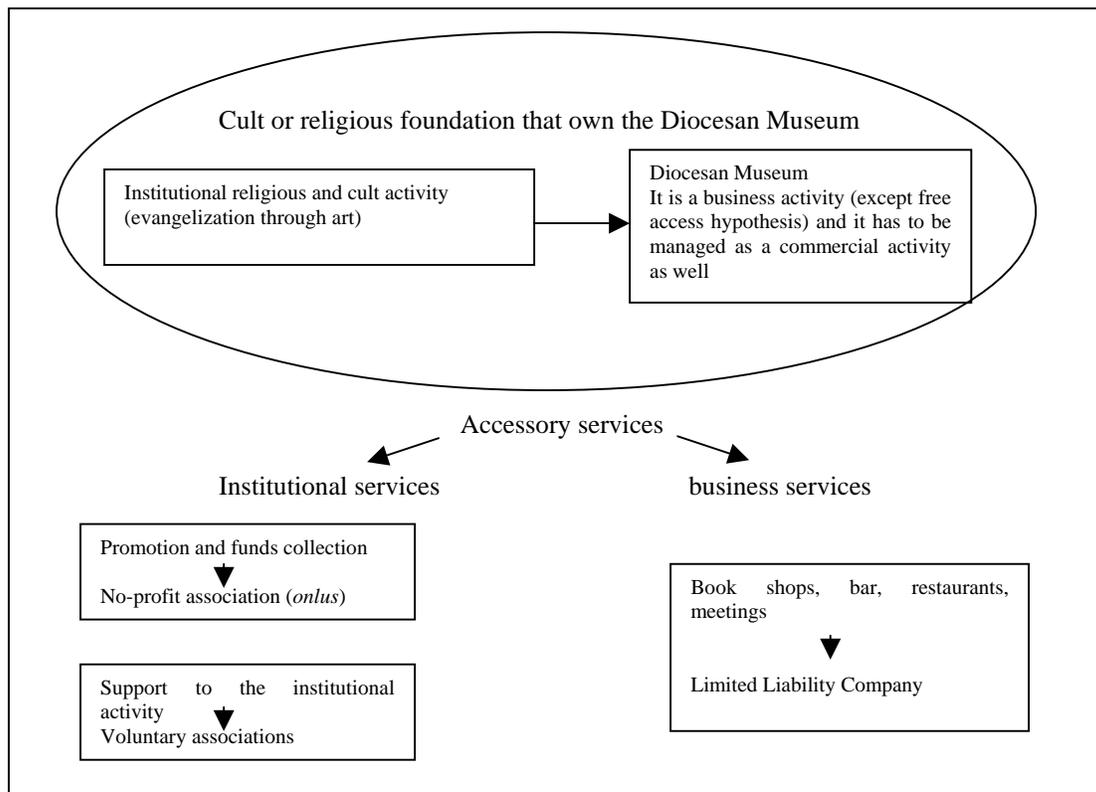
<sup>13</sup> These associations are conceived by the Law from 7.12.2000 and by the ministerial article n. 471/2001.

organizations.

Equally, the creation of a “museum system or diffused museum” requires means, such as link committees<sup>14</sup> (with charges of studying, promoting and coordinating) or conventions between the foundations that own Diocesan Museums, as well with other museums’ units.

Those conventions would make possible the procurement of many resources and services (staff, goods movement, restoration, laboratories, scientific, informative and technological advises, etc).

Fig. 1 –Juridical solutions for the supply of accessory services



Source: A. Fedeli, Curia Arcivescovile Milano, 2004.

### 5) Accessory services

The accessory services which might be granted by the Diocesan Museums operating on a

<sup>14</sup> The relating association may be considered in the statute of religious and cult foundation as a consultant member. This is composed by the President of the cult foundation, the director of diocesan museum, and by the responsables of other museal realities of the Diocese (archive and library), by a lay chosen by the pastoral council or eventual acknowledged.

systemic view may be both institutional<sup>15</sup> (promotion, funds collection, institutional activities) and commercial (bookshops, bars, restaurants, meetings, and so on). The promotion and the raising of funds may be managed by no-profit associations (f.i. *onlus*) while support services (guides, hostesses, catechesis through art), should be administrated by a voluntary association and the commercial ones by a business unit like a limited liability company, separating the two commercial activities by the institutional one and saving the monitoring function of the foundation (Fig. 1).

Presently, similar services are nowhere existing in the Diocesan Museums of Marches, neither are they contemplated in the future ones.

#### 6) *Accounting solutions*

In order to foresee the economical and financial effects<sup>16</sup> on a medium-long period and putting them into operative levels, two ways can be suggested. On one side, the economical and financial plane, including all the incomes (f.i. tickets, public and private contributions, CEI contributions, books sales, didactic papers) and the expenses (staff and services), distinguishing the ones related to institutional museums activity from the business ones, and the analysis of the break even point. On the other side, (programming made in the next future and operative levels) the budget (economical, financial and for the investments).

The reporting system should concern the patrimony aspect, as well as the economical, financial and monetary management, with particular attention to the monetary indicators and current management (running costs).

In the end, the account statement activity (the “accounting”) should include, as well as the asset and liability statement and profit and loss account, with shared indication of the values connected to the institutional museum activity and business activity which is not dominant in the unit, some explicative attachments (integrated comments and summary of funds movements -financial statement-), the report on management (or moral’s report) and from eventual controllers (auditor’s report).

The report on management (annual statement) is relevant for all the organizations which no longer unroll activities measurable with the market, as economical and financial statements

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<sup>15</sup> The main institutional services are referring to the inventory activity; conservation, maintenance and restoration, exposition, collection groups, institutional history of the museum (management and museum staging); research and study, temporary expositions (even on project only).

<sup>16</sup> On the importance of the consultant and the internal supervisor role of ecclesiastical commissions, which should collaborate with the board of directors to the solution of specific juridical and managerial problems, in order to make museal institutions get always preventive comments on the correctness of acts and the respect of rules, see M. Grumo “Un utile riferimento: la figura del revisore sociale degli enti non profit”, in A. Propersi, M. Grumo, 2004.

usually do not allow complete analysis on the activities made. Then, it's even true that the final result does not always resume the social and pastoral aims of Diocesan Museums. This report shows programming actions which are socially useful (it may also contain analytic schedules of planning shared for initiatives, where is specified the kind and the quality of the services offered and all the investments occurred; this data are basically the way for measuring the obtained performances), as programming actions we mean the support activities, of critical managerial features (f.i. internal and external financial resources, incidence of the various categories of revenues on the total income, analysis of users -target-).

This may also include some environmental analysis (evaluation of relationships with the local community and benefits produced by this, environmental obstacles on the management) and analysis on the organizational asset, with much evidence on the strength and weak points elements.

In conclusion, the report should indicate the aims and the institutional activity (number of partners, resources used, juridical data, seats, relationships with the social background, staff management, personnel training) and information on corporate governance (managers hierarchy, table of organization, management bodies, charges, delegations and financial resources, gifts).

The mission balance is an instrument for the Diocesan Museums too (Grumo, 2004)<sup>17</sup>. The aim of this is to focus the museum identity (values, mission, history, organizational structure, foundation strategy), identifying some critical sources (using budget re-classification) and expressing the relational context and stakeholders by a series of indicators with the same dimensions of the museal institution (museum and: users; families; staff; Public Administration; scientific and catholic community; banks; voluntaries; bank foundations; private citizens).

## **7 - Basic remarks and conclusions**

The experience of valorizing ecclesiastical goods and originating Diocesan Museums in Marches Region is only an example of the projects made in the Church context in the whole Country. It is not only an excellent example which can be tested in wider diocesan contexts (see the Diocesan Museum in Milan or Padova) but is also important because it makes people understand the difficulties faced by ecclesiastical institutions, and their efforts to achieve managerial and entrepreneurial competences in the socio-cultural and clerical context as well.

Nevertheless, some good results have been reached by the Dioceses already. The description of the steps and action strategies has shown matters and solutions worthy of entrepreneurial attitudes more than managerial. This approach is an important goal achieved by the Church in the context of cultural economics which has been for ages very distant from the economical or even entrepreneurial world.

The results obtained in terms of defence and valorisation of the heritage, referred to inventory and cataloguing of ecclesiastical goods, structure of the offices by the Dioceses, origin of a pool of high professional resources, and mix of financial sources, have brought to a system of Dioceses which are continuously improving and increasing thanks to the rebuilding activities occurred in the last decades. Mostly we have assisted to the phenomenon of museology re-definition. The process of creation of museums which is still in course is not yet the final goal to be reached, but intermediate, as there are regional networks to be fitted in the territory, that actually represent the ideal final result of Diocesan Museums in Marches Region.

Each Diocese is still a singular reality, even if the computerized data-base and the procedures are common for all artistic and cultural goods. We have mentioned inventories which do ensure a minimal standardized target of information, and this is an initial step towards integration as well as a valid occasion for studies and future researches.

The perspective from network, even if not totally shared now, will allow the enlargement of resources in the future, as well as of competences and services. This will make also possible to get scale economy and knowledge to increase the identity of museal institutions. Yet, this pattern grant Diocesan Museums in Marches the possibility of belonging to integrated project of valorization in the territory, and become important poles in cultural districts.

In this context the Diocesan Museums' system may offer the opportunity of a thematic way in which each museum may bring its own cultural witnesses as well its faith, as realities with specific contents, beside not ecclesiastical institutions.

But in the case of Diocesan Museum at least it seems to be too in advance. The existing Museums are directly managed by Dioceses when lacking planning instruments. Such transformation still requires to get time for making mentalities and attitudes change, and to allow the sharing and the application of principles and rules among diocesan institutions and their collaborators, and bring to innovative managerial solutions compared to the social context.

They also need to exploit the ability of relational communication that has been in the Church's hand for ages.

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<sup>17</sup> Grumo M. (2004), "La contabilità, il bilancio e il controllo dei musei ecclesiastici: problematiche operative e casi pratici", in Propersi A. and Grumo M..

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