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Impact assessment for museums

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Foreword

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Introduction

This document provides guidance to the museum community on assessing the impact of museums for individuals and society. It specifies the aspects of museum and describes methods to be used of museum of all types. Some methods are already used in museums while others are derived from museum literature.

Annex A gives examples of impact surveys for different target groups of museums.

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Impact assessment for museums

1 Scope

This document defines methods for measuring and assessing the impact of museums on individuals and on society. The methods described can be used for identifying areas of influence of museums and their services, and for reporting such influence to stakeholders and the general public.

This document does not intend to exclude the use of further instruments for assessing the impact of museums. This document does not deal with quality indicators for museums (see ISO 21246).

Not all methods described can apply to all museums at any time. Limitations on the applicability of individual methods are specified in the descriptions of the methods in this document.

2 Normative references

The following documents are referred to in the text in such a way that some or all of their content constitutes requirements of this document. For dated references, only the edition cited applies. For undated references, the latest edition of the referenced document (including any amendments) applies.

ISO 21246, *Information and documentation — Key indicators for museums*

3 Terms and definitions

For the purposes of this document, the following terms and definitions apply.

ISO and IEC maintain terminology databases for use in standardization at the following addresses:

— ISO Online browsing platform: available at https://www.iso.org/obp

— IEC Electropedia: available at https://www.electropedia.org/

3.1
access
<physical> right, opportunity, means of finding, using or retrieving information, of using a service; or entering a building

[SOURCE: ISO 11620:2023, 3.2]

3.2
accessibility
ease of reaching and using a service or facility

Note 1 to entry: This includes digital services, such as online catalogues or digital collections.

[SOURCE: ISO 11620:2023, 3.3, modified — Note 1 to entry added]

3.3
altruistic value
value (3.50) that is placed on a good or service giving the opportunity to be taken advantage of by others than the valuating person

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3.4
anecdotal evidence
proof based on anecdotes or stories, obtained informally from personal observations and experiences, not collected systematically nor empirically tested

[SOURCE: ISO 16439:2014, 3.5]

3.5
attitude
disposition to respond in a given way toward a class of objects or ideas

[SOURCE: ISO 5492:2008, 1.38]

3.6
benefit
helpful or good effect

[SOURCE: ISO 16439:2014, 3.7 modified — "or something intended to help" omitted]

3.7
bequest value
value of preserving (the existence of) a good or service to take advantage of in the future

3.8
catalogue
collection of records containing all known, relevant information about an object in a *museum* (3.29) collection

Note 1 to entry: Such information can include origin, age, creator, title (e.g. for works of art), physical description (materials and/or techniques used in production, physical dimensions), state of conservation, use, provenance, etc. of the object.

Note 2 to entry: For digital media, the addition of persistent identifiers may be included in the cataloguing.

[SOURCE: ISO 18461:2016, 2.8.2, modified — Note 1 "state of conservation" added; Note 2 to entry added]

3.9
community value
value (3.50) that is placed on the existence of a resource that can be used by a whole community

3.10
contingent valuation
method for assessing the economic value of non-profit institutions and projects of public utility depending on potential users' responses to survey questions, such as what they are willing to pay for a *benefit* (3.6) or feature (willingness-to-pay), or what they would accept as financial compensation if a certain benefit or feature was missing (willingness-to-accept)

Note 1 to entry: The method is used in environmental protection and health care, for example.

[SOURCE: ISO 16439:2014, 3.9]

3.11
cultural heritage
legacy of physical objects and intangible attributes of a group or a society that are inherited from past generations, maintained and protected in the present and preserved for future generations

[SOURCE: ISO 18461:2016, 2.1]

3.12
digitization
process of converting analogue materials into digital form

[SOURCE: ISO 21246:2019, 3.13]

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3.13
economic impact
effect of a policy, institution, programme, or event on the economy of a given area

Note 1 to entry: Economic impact is usually measured in terms of changes in economic growth (output or value added) and associated changes in jobs (employment) and income (wages).

[SOURCE: ISO 16439:2014; 3.16]

3.14
educational services
learning sessions and learning materials and programmes in all formats for children and adults for the purpose of enhancing skills and knowledge

Note 1 to entry: This includes the provision of services for schools and the cooperation with other partners in preparing and offering educational services.

[SOURCE: ISO 21246:2019, 3.17]

3.15
effectiveness
measurement of the degree to which given objectives are achieved

Note 1 to entry: An activity is effective if it maximizes the results it was established to produce.

[SOURCE: ISO 11620:2023, 3.22]

3.16
efficiency
measurement of the utilisation of resources to realize a given objective

Note 1 to entry: An activity is efficient if it minimizes the use of resources, or produces better performance with the same resources.

[SOURCE: ISO 11620:2023, 3.23]

3.17
evaluation
process of determining the *effectiveness* (3.15), *efficiency* (3.16), *benefit* (3.6) and relevance of a service or facility

[SOURCE: ISO 11620:2023, 3.25 modified, “utility” replaced by “benefit”]

3.18
event
pre-arranged singular activity having an intent within the *mission* (3.28) of the *museum* (3.29)

Note 1 to entry: The activity would usually be of a cultural, educational, social, political or scholarly nature, and would take the form of lectures, film screening, theatre performances, round table discussions, vernissage, finnisage, museum night, etc.

Note 2 to entry: Events can be organized inside or outside the museum premises.

Note 3 to entry: Events inside the museum premises organized by institutions outside the museum and without the museum’s participation should be counted separately.

Note 4 to entry: Guided tours, programmes, exhibitions and virtual events are excluded.

[SOURCE: ISO 21246:2019, 3.21]

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3.19
exhibition
curated display of museum objects or other items of cultural heritage on a clear concept and communicating a message

Note 1 to entry: Exhibitions can take place inside or outside the museum premises.

Note 2 to entry: Exhibitions can be *temporary* (3.46) or permanent (3.35).

Note 3 to entry: Virtual exhibitions are excluded.

Note 4 to entry: Exhibitions inside the museum premises organized by institutions outside the museum without the museum's participation should be counted separately.

[SOURCE: ISO 18461:2016, 2.4.6]

3.20
existence value
value of knowing that a good or service exists even though it is not intended to use it at this given moment in time

3.21
focus group interview
focus group discussion
group interview (3.23) in the form of a moderated discussion among a small number of selected individuals on topics introduced by the moderator

[SOURCE: ISO 16439:2014, 3.23]

3.22
goal
desired state of affairs to be achieved by the implementation of agreed policies

[SOURCE: ISO 21246:2019, 3.24]

3.23
group interview
interview (3.26) of an interviewer with a number of people who are assembled at some moment as a group, by posing a question and taking in the answer(s) of one or more members of this group

3.24
impact
change in an individual or group resulting from the contact with museum services

Note 1 to entry: The change can be tangible or intangible.

[SOURCE: ISO 16439:2014, 3.25, modified — "difference or" deleted, "library" replaced by "museum"]

3.25
inferred evidence
conclusions derived by reasoning from known premises

3.26
interview
oral questioning technique which results in a transfer of information from the interviewee to an interviewer or researcher

Note 1 to entry: This technique obtains direct reactions to questions, in contrast to written questionnaires or self-assessment (self-recording).

Note 2 to entry: Interviews can be subdivided according to the number of interviewees into one-to-one interviews and group interviews.

Note 3 to entry: Interviews can be structured, semi-structured or unstructured.

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Note 4 to entry: Where semi-structured or unstructured interviews are conducted with a group of respondents, these are usually described as group interviews.

Note 5 to entry: A specific type of group interview is the focus group interview or focus group discussion, where the topic is tightly defined, and the interaction among group members is of particular importance.

[SOURCE: ISO 16439:2014, 3.30 modified: Note 4 to entry modified; Note 5 to entry added]

3.27
longitudinal study
two or more surveys, in which the same or a similar survey instrument is administered more than once to the same population, after a suitable time period has elapsed, to measure changes in patterns of usage, perceptions, attitudes, etc.

[SOURCE: ISO 16439:2014, 3.35]

3.28
mission
statement approved by the authorities formulating the organization's *goals* (3.22) and its choices in services and products development

[SOURCE: ISO 21246:2019, 3.28]

3.29
museum
non-profit, permanent institution in the service of society and its development, open to the public, which acquires, conserves, researches, communicates and exhibits the tangible and intangible heritage of humanity and its environment for the purposes of education, study and enjoyment

Note 1 to entry: Natural, archaeological and ethnographic monuments and sites and historical monuments and sites of a museum nature are included, if they maintain a collection similar to museums.

Note 2 to entry: Zoos, aquaria, arboreta and botanical gardens are included, but should be reported separately.

Note 3 to entry: Collections in institutions of higher education that serve only the purposes of teaching and study are excluded.

Note 4 to entry: Conservation institutes and exhibition galleries in libraries and archives centres are included if they conform to the definition of museum.

Note 5 to entry: To conform to the definition it is not necessary that an institution be called a museum, but that it has the role and function of a museum.

[SOURCE: ISO 21246:2019, 3.29]

3.30
observed evidence
proof that is based on observing persons or processes

3.31
option value
value that is placed on having the option to take advantage of a good or service at a later point in time

3.32
outcome
direct, pre-defined effect of the output related to goals and objectives of the museum's planning (e.g. number of users, user satisfaction levels)

Note 1 to entry: This includes outcomes that concern the museum's institution or community.

[SOURCE: ISO 16439:2014, 3.44, modified "library" replaced by "museum"]

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3.33
output
products of museum processes

Note 1 to entry: Examples are number of exhibitions organized, number of objects acquired or number of opening hours per week.

[SOURCE: ISO 16439:2014, 3.45 modified, "library" replaced by "museum", examples changed and deferred to "Examples"]

3.34
panel study
longitudinal research where data is collected from the same sample on multiple occasions to track changes over time

3.35
perception
awareness of the effects of single or multiple sensory stimuli

[SOURCE: ISO 5492:2008, 2.3]

3.36
permanent exhibition
long-term exhibition
exhibition (3.19) showing, over a long period of time, objects which are in long-term custody of the museum

[SOURCE: ISO 18461:2016, 2.4.13]

3.37
preservation
all measures taken, including financial and strategic decisions, to maintain the integrity and extend the life of documents or collections

[SOURCE: ISO 5127:2017, 3.2.1.39, modified — Notes 1 and 2 to entry have been omitted.]

3.38
qualitative data
data describing, but not measuring the attributes or properties of an object, in particular the reasons for human actions

Note 1 to entry: The attributes can be categorized into classes that may be assigned numeric values.

[SOURCE: ISO 16439:2014, 3.52]

3.39
quantitative data
data in numerical form expressing a certain quantity, amount or range, amenable to statistical manipulation

Note 1 to entry: Quantitative data are usually expressed in measurement units.

[SOURCE: ISO 16439:2014, 3.5, modified — Examples in Note 1 to entry removed, e.g. number of loans, percentage of interviewees visiting the library]

3.40
questionnaire
set of questions for a survey or a structured *interview* (3.26)

Note 1 to entry: The questions may be closed (answerable by checking one of several predetermined answers) or open (requiring participants to answer in their own words).

[SOURCE: ISO 16439:2014, 3.55, modified — "semi-structured" deleted]

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