



**BSI Standards Publication**

## **Information and documentation — Key indicators for museums**

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## National foreword

This British Standard is the UK implementation of ISO 21246:2019.

The UK participation in its preparation was entrusted to Technical Committee IDT/2/15, Library and publishing statistics.

A list of organizations represented on this committee can be obtained on request to its secretary.

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© The British Standards Institution 2020  
Published by BSI Standards Limited 2020

ISBN 978 0 539 02404 3

ICS 01.140.20

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This British Standard was published under the authority of the Standards Policy and Strategy Committee on 31 January 2020.

### Amendments/corrigenda issued since publication

| Date | Text affected |
|------|---------------|
|------|---------------|

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## Information and documentation — Key indicators for museums

*Information et documentation — Indicateurs clés des musées*





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# Contents

Page

|                                                                                                        |           |
|--------------------------------------------------------------------------------------------------------|-----------|
| <b>Foreword</b>                                                                                        | <b>iv</b> |
| <b>Introduction</b>                                                                                    | <b>v</b>  |
| <b>1 Scope</b>                                                                                         | <b>1</b>  |
| <b>2 Normative references</b>                                                                          | <b>1</b>  |
| <b>3 Terms and definitions</b>                                                                         | <b>1</b>  |
| <b>4 Functions and quality aspects of museums</b>                                                      | <b>11</b> |
| 4.1 Core functions of museums                                                                          | 11        |
| 4.1.1 Collecting                                                                                       | 11        |
| 4.1.2 Preserving                                                                                       | 11        |
| 4.1.3 Exhibiting (Presenting)                                                                          | 11        |
| 4.1.4 Educational activities                                                                           | 12        |
| 4.1.5 Research                                                                                         | 12        |
| 4.1.6 Management                                                                                       | 12        |
| 4.2 Quality aspects of museums                                                                         | 12        |
| <b>5 Key indicators for museums</b>                                                                    | <b>13</b> |
| 5.1 General                                                                                            | 13        |
| 5.2 Criteria for museum indicators                                                                     | 13        |
| 5.3 Use of museum indicators                                                                           | 14        |
| 5.4 Selection of museum indicators                                                                     | 14        |
| 5.5 Comparability of results                                                                           | 14        |
| 5.6 Descriptive framework                                                                              | 15        |
| 5.6.1 General                                                                                          | 15        |
| 5.6.2 Name                                                                                             | 15        |
| 5.6.3 Background                                                                                       | 15        |
| 5.6.4 Objective of the indicator                                                                       | 15        |
| 5.6.5 Scope                                                                                            | 15        |
| 5.6.6 Definition of the indicator                                                                      | 15        |
| 5.6.7 Method                                                                                           | 15        |
| 5.6.8 Interpretation and use of results                                                                | 16        |
| 5.6.9 Source(s)                                                                                        | 16        |
| <b>6 List of key indicators for museums</b>                                                            | <b>16</b> |
| 6.1 General                                                                                            | 16        |
| 6.2 Museum functions and key indicators                                                                | 16        |
| 6.2.1 Collections                                                                                      | 16        |
| 6.2.2 Exhibitions                                                                                      | 16        |
| 6.2.3 Digitization                                                                                     | 17        |
| 6.2.4 Visits/Visitors/General awareness                                                                | 17        |
| 6.2.5 Educational activities and events                                                                | 17        |
| 6.2.6 Research                                                                                         | 17        |
| 6.2.7 Management                                                                                       | 17        |
| 6.3 List of key indicators for museums                                                                 | 17        |
| <b>Annex A (normative) Description and calculation of indicators</b>                                   | <b>20</b> |
| <b>Annex B (informative) Checklist of additional information for the quality assessment of museums</b> | <b>66</b> |
| <b>Bibliography</b>                                                                                    | <b>68</b> |

## Foreword

ISO (the International Organization for Standardization) is a worldwide federation of national standards bodies (ISO member bodies). The work of preparing International Standards is normally carried out through ISO technical committees. Each member body interested in a subject for which a technical committee has been established has the right to be represented on that committee. International organizations, governmental and non-governmental, in liaison with ISO, also take part in the work. ISO collaborates closely with the International Electrotechnical Commission (IEC) on all matters of electrotechnical standardization.

The procedures used to develop this document and those intended for its further maintenance are described in the ISO/IEC Directives, Part 1. In particular, the different approval criteria needed for the different types of ISO documents should be noted. This document was drafted in accordance with the editorial rules of the ISO/IEC Directives, Part 2 (see [www.iso.org/directives](http://www.iso.org/directives)).

Attention is drawn to the possibility that some of the elements of this document may be the subject of patent rights. ISO shall not be held responsible for identifying any or all such patent rights. Details of any patent rights identified during the development of the document will be in the Introduction and/or on the ISO list of patent declarations received (see [www.iso.org/patents](http://www.iso.org/patents)).

Any trade name used in this document is information given for the convenience of users and does not constitute an endorsement.

For an explanation of the voluntary nature of standards, the meaning of ISO specific terms and expressions related to conformity assessment, as well as information about ISO's adherence to the World Trade Organization (WTO) principles in the Technical Barriers to Trade (TBT), see [www.iso.org/iso/foreword.html](http://www.iso.org/iso/foreword.html).

This document was prepared by Technical Committee ISO/TC 46, *Information and documentation*, Subcommittee SC 8, *Quality — Statistics and performance evaluation*.

Any feedback or questions on this document should be directed to the user's national standards body. A complete listing of these bodies can be found at [www.iso.org/members.html](http://www.iso.org/members.html).

## Introduction

This document provides guidance to the museum community on the use of key museum indicators. It specifies the requirements of a key indicator for museums and establishes a set of indicators to be used by museums of all types.

Some of the indicators included in this document are already in use by museums, or have been proposed in recent museum literature. Other indicators have been taken from library standards and adapted to the requirements of museums. [Annex A](#) describes the key indicators that have been found useful for quality assessment of museums. The data specified in [Annex B](#) can be used for complementing and supporting the information gained by using the key museum indicators, though they are not in themselves such indicators. This document has been developed in close cooperation with the International Council on Museums (ICOM) and takes advantage of, particularly, the work of the European Group on Museum Statistics (EGMUS).

# Information and documentation — Key indicators for museums

## 1 Scope

This document specifies a set of key indicators for assessing the quality of museums:

- for the purpose of strategic planning and internal management of museums;
- for reporting to stakeholders such as funding institutions, policy makers, or the public;
- to promote the museums' role and value for learning and research, education and culture, social and economic life;
- for comparing results over time and between museums.

The aim of this document is to provide a selection of key indicators applicable to a wide range of museums. It is recognized that not all indicators are pertinent for each individual museum category or each individual museum. Limitations on the applicability of individual indicators are listed in the scope clause of the description of each indicator (see [Annex A](#)).

This document is not intended to exclude the use of other indicators not specified in it.

## 2 Normative references

There are no normative references in this document.

## 3 Terms and definitions

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

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

- ISO Online browsing platform: available at <https://www.iso.org/obp>
- IEC Electropedia: available at <http://www.electropedia.org/>

### 3.1

#### **accessibility**

ease of reaching and using a service or facility

[SOURCE: ISO 11620:2014, 3.2]

### 3.2

#### **accession**

addition

formal act of entering an object into the collections of a museum

Note 1 to entry: Once an object has been accessioned, it has a status beyond that of merely being the property of the organization and can only be disposed of by referring to the governing body of the organization, e.g. the trustees or director.

[SOURCE: ISO 18461:2016, 2.5.1]

### 3.3

#### **accession register**

itemized list or record of the objects properly added to a museum collection during a specified period of time

[SOURCE: ISO 18461:2016, 2.8.1]

### 3.4

#### **acquisition**

process of gaining legal possession of an object for a museum collection through purchase, *donation* (3.16), bequest, transfer or fieldwork

[SOURCE: ISO 18461:2016, 2.5.2]

### 3.5

#### **capital expenditure**

expenditure which results in the *acquisition* (3.4) of, or addition to, fixed assets

Note 1 to entry: This includes expenditure on building sites, new buildings and extensions, furnishings and equipment for new and expanded buildings, computer systems (hardware and software), etc. When applicable, local and national sales/purchase taxes [e.g. Value Added Tax (VAT)] are included.

[SOURCE: ISO 2789:2013, 2.6.1]

### 3.6

#### **catalogue**

collection of records filing/storing relevant information about an object in a museum collection

[SOURCE: ISO 18461:2016, 2.8.2, modified — The phrase “all known” has been excluded.]

### 3.7

#### **cataloguing**

process of recording and filing/storing relevant information about an object in a museum 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 its making, physical dimensions), use, provenance, etc. of the object.

[SOURCE: ISO 18461:2016, 2.8.3, modified — The phrase “all known” has been excluded]

### 3.8

#### **collection**

body of acquired objects held in title by a museum

[SOURCE: ISO 18461:2016, 2.5.9]

### 3.9

#### **collection management**

all practices and procedures implemented by a museum in acquiring, documenting, handling, accessing, *cataloguing* (3.7), storing, securing, lending, conserving and disposing of collection objects

[SOURCE: ISO 18461:2016, 2.5.10]

### 3.10

#### **collection policy**

museum's scope and its aims, practices and procedures of *collection management* (3.9)

Note 1 to entry: The collection policy also identifies the kinds of objects a museum will collect, the terms and conditions governing acquisitions and the deaccession policy.

[SOURCE: ISO 18461:2016, 2.5.11]

**3.11****conservation**

preservation measures and actions applied to prevent, arrest or delay deterioration of a *document* (3.15) or other material object

[SOURCE: ISO 5127:2017, 3.12.1.01]

**3.12****digital collection**

all objects in digital form in the museum collection, whether born digital or digitized

Note 1 to entry: *Documents* (3.15) are included.

[SOURCE: ISO 18461:2016, 2.5.13]

**3.13****digitization**

process of converting analogue materials into digital form

[SOURCE: ISO 2789:2013, 2.3.15]

**3.14****digitized object**

digitally reproduced object

Note 1 to entry: A two-dimensional or three-dimensional object is counted as digitized if its metadata and at least one image of it are available in digital format.

Note 2 to entry: Documents such as autographs, books or audiovisual documents are counted as digitized if their metadata and their contents are available in digital format.

Note 3 to entry: *Documents* (3.15) are included.

[SOURCE: ISO 18461:2016, 2.5.15]

**3.15****document**

recorded information or material object which can be treated as a unit in a documentation process

Note 1 to entry: Documents can differ in form and characteristics.

[SOURCE: ISO 5127:2017, 3.1.1.38, modified — Note 1 to entry of ISO 2789:2013, 2.3.17 has been included.]

**3.16****donation**

gift

*acquisition* (3.4) without monetary compensation but with change of ownership and legal title

[SOURCE: ISO 5127:2017, 3.6.2.2.11]

**3.17****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 21248:2019, 3.22, modified — The phrase “in library and information use” has been excluded and the terms “and knowledge” added. Note 2 to entry has been omitted.]

**3.18**  
**effectiveness**

measure 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 11620:2014, 3.15]

**3.19**  
**efficiency**

measure of the utilisation of resources to realize a given *objective* ([3.35](#))

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 11620:2014, 3.16]

**3.20**  
**evaluation**

process of determining the *effectiveness* ([3.18](#)), *efficiency* ([3.19](#)), utility and relevance of a service or facility

[SOURCE: ISO 11620:2014, 3.19]

**3.21**  
**event**

pre-arranged singular activity having an intent within the *mission* ([3.28](#)) of the museum

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 without the museum's participation should be counted separately.

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

[SOURCE: ISO 18461:2016, 2.4.5]

**3.22**  
**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 or permanent.

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]

### 3.23 full-time equivalent FTE

measurement equal to one staff person working a full-time work schedule for one year

Note 1 to entry: For example, if out of three persons employed as museum employees, one works quarter-time, one works half-time, and one works full-time, then the FTE of these three persons would be  $0,25 + 0,5 + 1,0 = 1,75$  employees (FTE).

[SOURCE: ISO 11620:2014, 3.23]

### 3.24 goal

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

[SOURCE: ISO 11620:2014, 3.24]

### 3.25 income generated

income generated by museum operations and from fees, charges, subscriptions and *donations* ([3.16](#))

[SOURCE: ISO 2789:2013, 6.6.3, modified — the term “library” has been replaced by “museum”. The phrase “that is available to the library for expenditure” has been excluded.]

### 3.26 inventory

itemized list or record of all objects contained in a museum collection during a specified period of time

[SOURCE: ISO 18461:2016, 2.8.7]

### 3.27 loan

lending of an object in the museum's collection to, or borrowing an object from, other collecting organisations, private collectors, or agencies

Note 1 to entry: Deposits (permanent loans) are counted separately.

[SOURCE: ISO 18461:2016, 2.4.7]

### 3.28 mission

statement approved by the authorities formulating the organization's *goals* ([3.24](#)) and its choices in services and products development

[SOURCE: ISO 11620:2014, 3.33]

### 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: ICOM, Museum definition, 2007]

### 3.30

#### **museum employee**

person who works for a museum in return for payment

[SOURCE: ISO 2789:2013, 2.7.1, modified — The term “library” has been replaced by “museum”.]

### 3.31

#### **museum key indicator**

numerical, symbolic or verbal expression assessing the activity of a museum in view of its *mission* ([3.28](#))

Note 1 to entry: The indicators can be derived from museum statistics and from other data used to characterize the museum activities.

### 3.32

#### **museum staff research publication**

research publication by museum staff on professional and academic subjects

Note 1 to entry: Includes publications in all formats, and presentations at conferences.

[SOURCE: ISO 2789:2013, 2.5.4, modified — The term “library” has been replaced by “museum”.]

### 3.33

#### **museum website**

unique domain on the Internet consisting of a collection of web pages that is published by a museum to provide access to the museum’s services and resources

[SOURCE: ISO 2789:2013, 2.2.18, modified — The term “library” has been replaced by “museum”. Notes to entry 1 to 3 have been omitted.]

### 3.34

#### **object**

item which forms part of a museum’s collection

Note 1 to entry: For objects in natural science collections the term “specimen” is generally used.

Note 2 to entry: *Documents* ([3.15](#)) are included.

[SOURCE: ISO 18461:2016, 2.5.24]

### 3.35

#### **objective**

specific target for an activity to be attained as a contribution to achieving the *goal* ([3.24](#)) of an organization

[SOURCE: ISO 11620:2014, 3.34]

### 3.36

#### **online access**

successful request of a museum-provided online service

Note 1 to entry: An online access is one cycle of user activities that typically starts when a user connects to a museum-provided online service and ends by a terminating activity that is either explicit (by leaving the service through log-out or exit) or implicit (timeout due to user inactivity).

Note 2 to entry: Online accesses to the museum website are counted as virtual visits.

Note 3 to entry: If possible, requests by robots/web crawlers should be excluded.

[SOURCE: ISO 2789:2013, 2.2.1, modified — The term “access” has been changed to “online access”. The term “library” has been replaced by “museum”. Note 3 to entry has been omitted.]

### 3.37

#### **online catalogue**

database of records and images describing objects of one or more museums presented for public access

[SOURCE: ISO 18461:2016, 2.4.11]

### 3.38

#### **open access**

unrestricted access to information, *documents* (3.15) or information services

Note 1 to entry: This does not necessarily imply that the access is free of charge.

[SOURCE: ISO 5127:2017, 3.11.1.05, modified — Note 1 to entry has been added.]

### 3.39

#### **opening hours**

hours in a normal week when the museum is accessible to visitors

[SOURCE: ISO 18461:2016, 2.6.4]

### 3.40

#### **permanent exhibition**

long-term exhibition

exhibition showing, over a long period of time, objects which are in long-term custody of the museum

[SOURCE: ISO 18461:2016, 2.4.13]

### 3.41

#### **physical visit**

act of entering the museum premises with the aim of experiencing its exhibitions, programmes or other services directed towards the public

[SOURCE: ISO 18461:2016, 2.4.14, modified — The terms “into one or all of the parts of” have been deleted, and the phrase “with the aim of experiencing its exhibitions, programmes or other services directed towards the public” has been added.]

### 3.42

#### **preservation**

all measures taken, including financial and strategic decisions, to maintain the integrity and extend the life of *documents* (3.15) or collections

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

### 3.43

#### **process**

set of interrelated or interacting activities which transform inputs into outputs (e.g. preparing an exhibition, cataloguing, lending, reference service)

[SOURCE: ISO 16439:2014, 3.50]

### 3.44

#### **professional staff member**

*museum employee* (3.30) who has graduated at university level or in a special training course in the museum sector and whose duty requires professional education or experience

### 3.45

#### **programme**

pre-arranged on-going and repeatable activity having an intent within the mission of the museum

Note 1 to entry: The activity would usually be of a cultural, educational, social political or scholarly nature, and would take the form of workshops, travel programmes, courses for school classes, etc.

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

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

Note 4 to entry: Events, guided tours, exhibitions and virtual events are excluded, but are counted separately.

Note 5 to entry: Virtual programmes are included, but should be counted separately.

[SOURCE: ISO 18461:2016, 2.4.15]

### 3.46

#### **project**

unique process, consisting of a set of coordinated and controlled activities with start and finish dates, undertaken to achieve an objective conforming to specific requirements, including the constraints of time, cost and resources

Note 1 to entry: An individual project can form part of a larger project structure.

Note 2 to entry: Adapted from ISO 9000:2015.

[SOURCE: ISO 18461:2016, 2.8.10]

### 3.47

#### **record**

set of data on one person, object or *event* ([3.21](#)), selected and presented for a predefined purpose

Note 1 to entry: The record can include elements such as title, creator, subject, description, date of origin, etc.

[SOURCE: ISO 18461:2016, 2.8.11]

### 3.48

#### **reliability**

degree to which a measure repeatedly and consistently produces the same result

[SOURCE: ISO 11620:2014, 3.44]

### 3.49

#### **restoration**

actions taken to return a *document* ([3.15](#)) or other material object which has suffered deterioration or damage as closely as practicable to its original state

Note 1 to entry: In archival restoration, no attempt is made to recreate missing text, etc., and all restoration work is kept clearly evident.

[SOURCE: ISO 5127:2017, 3.12.1.02, modified — The term “preservation” has been excluded in the definition, and Note 2 to entry has been omitted.]

### 3.50

#### **satisfaction survey**

survey administered to a sample of a museum's users to find out how they rate the quality of their museum experiences, and any suggestions for improvement

Note 1 to entry: The survey may be conducted face to face, via handouts, telephone, email, or Internet.

Note 2 to entry: The survey can contain questions about user status, how often and how they normally use the resources and services the museum provides.

Note 3 to entry: In a longitudinal study, the same or a similar survey instrument is administered more than once, after a suitable interval of time has elapsed, to measure changes in patterns of usage, perceptions, attitudes, etc.

[SOURCE: ISO 16439:2014, 3.72, modified — The term “library” has been replaced by “museum”.]

### **3.51**

#### **score**

result, often expressed numerically, of a museum indicator

### **3.52**

#### **special grant**

grant of a non-recurrent nature to fully or partially fund projects

[SOURCE: ISO 2789:2013, 2.6.4, modified — The definition has been slightly modified.]

### **3.53**

#### **staff training**

formal pre-planned training which can be held in-house or externally, and delivered by museum staff or external experts

Note 1 to entry: Informal training, e.g. point-of-use training, is excluded.

Note 2 to entry: Online training is included.

[SOURCE: ISO 2789:2013, 2.7.6, modified — The term “library” has been replaced by “museum”, and Note 2 to entry has been added.]

### **3.54**

#### **storage area**

area of the museum where the objects are kept under controlled conditions if not on display or in technical treatment

[SOURCE: ISO 18461:2016, 2.6.5]

### **3.55**

#### **target group**

group of actual and potential visitors appropriate to a museum as the object of a specific service or as the primary users of specific materials

Note 1 to entry: Such target groups can, for example, be children, school classes, researchers, or educators.

[SOURCE: ISO 11620:2014, 3.49, modified — “target population” has been changed to “target group”, the term “library” has been replaced by “museum”, and Note 1 to entry has been added for clarification.]

### **3.56**

#### **temporary exhibition**

short-term exhibition

exhibition shown during a limited period of time

Note 1 to entry: A temporary exhibition is counted only once, in the year it is started.

[SOURCE: ISO 18461:2016, 2.4.19]

### **3.57**

#### **travelling exhibition**

exhibition that is shown consecutively in several locations

[SOURCE: ISO 18461:2016, 2.4.19]

**3.58**

**user**

recipient of museum services

Note 1 to entry: The recipient can be a person or an institution, including museums.

Note 2 to entry: Museum services include electronic services, physical services and visiting the museum premises.

[SOURCE: ISO 2789:2013, 2.2.36, modified — The term “library” has been replaced by “museum”.]

**3.59**

**validity**

extent to which the results of a research process represent what was intended

[SOURCE: ISO 20252:2006, 2.62]

**3.60**

**value**

importance that stakeholders (funding institutions, politicians, the public, users, staff) attach to museums and which is related to the perception of actual or potential benefit

Note 1 to entry: Monetary value can be included.

[SOURCE: ISO 16439:2014, 3.75, modified — The term “library” has been replaced by “museum.”]

**3.61**

**virtual event**

event in electronic format, specially designed for use via the Internet

[SOURCE: ISO 2789:2013, 2.2.38]

**3.62**

**virtual exhibition**

exhibition in electronic format, specially designed for use via the Internet

[SOURCE: ISO 18461:2016, 2.4.19]

**3.63**

**virtual visit**

one continuous cycle of user activities on the *museum website* ([3.33](#)), regardless of the number of pages or elements viewed

Note 1 to entry: A virtual visit typically starts when a user accesses the museum website after visiting an external page, and ends if no activity has been recorded for a defined period of time (a maximum of 30 min). Another access after a longer interval initiates a new visit.

Note 2 to entry: A virtual visitor should at least be identified by a unique cookie and/or by a unique combination of the user's IP address and browser string (user agent). Known web spiders and harvesters should be excluded.

[SOURCE: ISO 2789:2013, 2.2.39, modified — The term “library” has been replaced by “museum”, and the phrase “by users from outside the library's IP address space (usually from outside the library premises)” has been omitted.]

**3.64**

**visitor**

person (individual) entering the museum premises with the aim of experiencing its exhibitions, programmes, or other services directed towards the public

**3.65****visitor with special needs**

person that requires special services and/or facilities for a museum visit

Note 1 to entry: The special needs can be caused by physical and health impairment, cultural difference (e.g. non-native speakers, new arrivals), educational background, or other circumstances that require special museum services and/or facilities.

Note 2 to entry: Children, young people and seniors without additional needs are not included.

[SOURCE: ISO 2789:2013, 2.2.35, modified — “target population with special needs” has been replaced by “visitor with special needs”, the text has been adapted to museum visitors. Note 3 and 4 to entry have been omitted.]

**3.66****volunteer**

person working on museum tasks without payment

Note 1 to entry: Volunteers can receive token reimbursements or expense allowances.

[SOURCE: ISO 2789:2013, 2.7.7, modified — the term “library” has been replaced by “museum”.]

**4 Functions and quality aspects of museums****4.1 Core functions of museums****4.1.1 Collecting**

The main tasks are:

- to regularly acquire objects, along and within the collection policy of the museum;
- to formulate a written collection policy according to the museum’s mission and to constantly pursue and update it;
- to catalogue/describe the collected objects in the inventory documents and in scientific catalogues and databases;
- to make the collections visible and accessible by online catalogues and via the Internet.

**4.1.2 Preserving**

The main tasks are:

- to preserve the museum’s analogue and digital collections through safe storage, stable environment, preventive conservation and restoration treatment;
- to develop and promote disaster management plans.

**4.1.3 Exhibiting (Presenting)**

The main tasks are:

- to present the collections to the general public via permanent and temporary exhibitions;
- to make the collections accessible in digital formats and in online environments;
- to offer regular and adequate opening times;
- to offer suitable services for persons with special needs.

#### 4.1.4 Educational activities

The main tasks are:

- to support learning and education by offering educational programmes related to the museum's mission, collections and themes;
- to consider the needs of specific groups (adults, children, students, refugees, etc.) in programmes and events;
- to provide services for schools.

#### 4.1.5 Research

The main tasks are:

- to promote the collections by research and publications;
- to provide access for researchers;
- to initiate and support research projects on collection objects;
- to organize conferences and seminars based on the research.

#### 4.1.6 Management

The main tasks are:

- to ensure effectiveness and cost-efficiency (using adequate technology and management methods);
- to arrange for clearly defined procedures;
- to provide for staff development;
- to cooperate locally, regionally, nationally and internationally with museums and other organizations.

### 4.2 Quality aspects of museums

A number of key factors are essential for achieving successful museum work. The most relevant of these are:

- a) a clear concept and general attractiveness of the permanent and temporary exhibitions;
- b) adaptation of the permanent exhibition to current research and educational concepts;
- c) a general research plan including research activities and publications by staff;
- d) differentiated individual descriptions of each object;
- e) uniqueness and/or context of collection objects (reasons why a specific object is kept in the collection).

In addition, more general quality characteristics are named in the literature on museums. Examples are:

- competence of staff: Staff should be well trained in all museum activities;
- accuracy and reliability of the services, e.g. unbiased and scientifically sound presentation and description of objects, up-to-date catalogues, correct answers to researchers' questions;
- accessibility: The museum building, the exhibitions, the digitized collections and other services should be easily accessible. Examples are adequate opening times, efficient sign-posting, usability of databases and the website, simple-to-use online services, intellectual and physical accessibility;

- aesthetics: visual attractiveness (building, display of collection);
- visitor-orientation: Services should be oriented to the visitors and, along with that, to the specific target groups that the museum aims to serve, e.g. families, the local community, citizens with special interests, researchers, tourists or children;
- effectiveness and efficiency: All processes in the museum should be well organized and streamlined, so that quality can be offered with minimum resources;
- helpfulness of staff: Staff working with the public should be friendly and responsive, and should possess communication skills.

## 5 Key indicators for museums

### 5.1 General

For the following chapter, especially for the general description of museum key indicators and their use, this document relies partly on ISO 11620.

Museum key indicators can give information to which extent the goals of a museum have been reached. They can be used to assess the quality and effectiveness and/or efficiency of the functioning and the services of a museum. They can and should also indicate problems and shortcomings in the performance of the museum so that action can be taken to remedy these. It is vital that the indicators in this document allow a rational, unbiased and not locally restricted assessment of museums and their contribution to society.

Indicators combine data collected for the annual museum statistics and data that may be collected additionally for a specific indicator. Each indicator shall be capable of showing whether a higher or a lower score indicates higher quality.

All key indicators included in [Annex A](#) fulfil the criteria presented in [5.2](#) and are specified according to the descriptive framework presented in [5.6](#). The indicators shall be calculated and used as specified in [Annex A](#).

### 5.2 Criteria for museum indicators

Museum indicators shall be:

- a) informative for measuring an activity, for identifying achievements, and for identifying problems and shortcomings in the performance of the museum;
- b) reliable, i.e. constantly produce the same result when used repeatedly under the same circumstances;

NOTE Variations do not make an indicator unreliable.

- c) valid, i.e. shall measure what they are intended to measure;

NOTE Estimations are possible.

- d) *appropriate* for their purpose, applicable to the institution and situation (museum environment) for which they are meant and expressing exactly those, and only those, features that are intended to be measured;
- e) practical, i.e. using a reasonable amount of resources (money, time, qualified staff, involvement of museum visitors, etc.).

If the museum indicator is intended for comparisons between museums, a further criterion applies:

- 1) The museum indicators shall be comparable: An indicator allows comparison if the same score, making allowance for the accuracy of the score, means the same level of quality or efficiency in the museums to be compared.

### **5.3 Use of museum indicators**

Museum indicators can be used as tools:

- to assess the quality and effectiveness of activities, resources, and services provided by a museum;
- and to assess the efficiency of resources allocated by the museum to such activities and services.

The indicators can and should also indicate problems and shortcomings in the performance of the museum.

As an evaluation tool, museum indicators have three principal objectives:

- a) to make the management process more effective;
- b) to serve as a basis for reference and for dialogues between museum staff, funding bodies, and the user community;
- c) to serve in comparative analysis of museums which have similar missions or objectives.

Users of museum indicators should recognize that it is impossible to achieve optimum scores simultaneously on all indicators. For example, a museum may achieve a high level of popularity in the population by spectacular exhibitions, but the staff resources spent on the exhibitions may be lacking in other areas, so that cataloguing or digitisation cannot achieve high scores.

Scores on museum indicators shall be interpreted in the light of what the museum intends to accomplish, and not simply in terms of optimizing scores on particular indicators.

### **5.4 Selection of museum indicators**

This document recognizes that there are many different types of museums, e.g. in different settings, serving different visitor populations. Since there is such a wide variation around the world, it is important to understand that not all museum indicators are useful for all museums.

Museums, in consultation with the relevant parties, shall decide which indicators are most appropriate in the given situation. The decision shall be made in the light of the mission, goals and objectives of the museum. All parties concerned should be in agreement on the appropriateness of the museum indicators used.

Several of the indicators will need appropriate staff skills on all levels to be implemented and processed.

### **5.5 Comparability of results**

A primary purpose of using museum indicators is self-diagnosis. This may include longitudinal studies that compare one year's performance with another, within the same museum.

A secondary purpose is to encourage meaningful and useful comparisons across different museums. Standardizing museum indicators and the procedures for collecting the data assists in that process. However, such comparisons shall always be made respecting each museum's:

- mission and core tasks;
- resources;
- different audiences;

- governance model;
- in-house procedures.

If comparisons of indicator scores across different museums are made, they should be done with considerable care and in full recognition of the limitations of such comparisons.

## 5.6 Descriptive framework

### 5.6.1 General

Each indicator is presented in the standard format described in this clause.

### 5.6.2 Name

Each museum key indicator shall have a unique, descriptive name.

### 5.6.3 Background

The background statement describes the actual state and importance of the service, activity or aspect the indicator is meant to measure.

The statement shows what is regarded as quality in the service, activity or aspect in museums and what measures/indicators have as yet been used for assessing that quality.

### 5.6.4 Objective of the indicator

The objective indicates what the indicator is meant to measure in relation to the museum's goals.

### 5.6.5 Scope

The scope shall state the types of museums to which the indicator can be applied.

The scope may state whether the indicator is suitable for comparison between museums and whether there are any limitations concerning comparability.

The scope may include other limitations in the application of the indicator.

### 5.6.6 Definition of the indicator

The definition describes the data that are necessary for the indicator and their relation.

Unambiguous terms used in the customary sense need not be defined.

### 5.6.7 Method

This section describes the way in which the data are collected and results are calculated.

If more than one method has been shown to be effective for the same purpose, several methods are described.

The descriptions supplied shall not include general statistical methodology such as sampling procedures, sampling sizes, estimates of confidence intervals, statistical tests, etc.

If a measure needs to be repeated to determine the value of the indicator, this shall be stated clearly.

If possible, the descriptions of methods shall indicate the effort necessary for preparation, data collection and analysis of results.

### 5.6.8 Interpretation and use of results

This section discusses how the results might be interpreted, especially reasons for low effectiveness. It points to difficulties and to circumstances that could affect the results.

The statement names possible reactions to the results in order to achieve better results and explains what other key indicators might be useful in the same context.

The interpretation statement may include information about the variations to be expected, such as seasonal variations or variations in time of day.

### 5.6.9 Source(s)

References are supplied to document the source of the indicator. The description should state clearly whether the indicator as described in this document is a modified version of the indicator described in the source document.

If the name of the indicator is different from the one used in the source, the original name is supplied in parentheses after the reference.

The references may include documents supplying more detailed information about the use of the indicator, methods of data collection and analysis, etc.

## 6 List of key indicators for museums

### 6.1 General

The indicators in [Table 1](#) are grouped by the functions and activities to which they relate, and reference is given to the descriptions provided in [Annex A](#).

The indicators shown in [Table 1](#) were adapted from the following sources:

- literature and projects of performance measurement in museums, see References [\[10\]](#), [\[12\]](#), [\[15\]](#), [\[18\]](#) and [\[20\]](#);
- museum assessment programmes of different countries and regions, often in the form of self-assessment, see References [\[9\]](#), [\[11\]](#) and [\[16\]](#);
- the library standard ISO 11620[\[3\]](#).

### 6.2 Museum functions and key indicators

#### 6.2.1 Collections

- Key indicators: The indicators assess how far the objects in the collection have been catalogued, and whether the records are searchable on the Internet. The number of loans to other museums (generally for exhibitions) can show the renown and uniqueness of the collection. The indicators also evaluate the museum's engagement in preservation: adequate storage, the preservation condition of objects, and the treatment of damaged or endangered objects.
- Additional information: It may also be interesting to know whether the museum has a written collection policy, and the frequency of controlling the storing conditions and the preservation condition.

#### 6.2.2 Exhibitions

- Key indicators: The indicators measure the uniqueness of exhibited objects and the renown and up-to-dateness of the permanent and temporary exhibitions.

- Additional information: The number of exhibitions and of visitors to exhibitions can give valuable information.

### 6.2.3 Digitization

- Key indicators: Digitization as the new form of giving access to the collections is evaluated as to comprehensiveness and usefulness.
- Additional information: The size of the digitized collection and the number of annual additions should be counted.

### 6.2.4 Visits/Visitors/General awareness

- Key indicators: The indicators grouped under “visits/visitors” relate to how visitors and the general population value a specific museum or to the satisfaction grades of visitors. The indicators also measure repeat visitors and the increase in first-time visitors.
- Additional information: Assessing the reasons for museum use and museum visits may give additional information.

### 6.2.5 Educational activities and events

- Key indicators: The indicators assess the museum’s engagement in educational services by the input of staff resources and the attractiveness of educational programmes by the satisfaction of the attendants.
- Additional information: Attendants might be subdivided as to specific groups (such as adults, children, students, tourists, immigrants).

### 6.2.6 Research

- Key indicators: The indicator assesses the value of staff research by the number of research publications.
- Additional information: The number of conferences and seminars organized by the museum and the number of staff members with PhDs might give valuable information.

### 6.2.7 Management

- *Key indicators:* The indicators assess the museum’s ability to cope with funding issues by a high percentage of self-generated income. The museum’s fitness for future is assessed by its engagement in staff training and cooperation and by its attraction for volunteers.

## 6.3 List of key indicators for museums

[Table 1](#) contains 30 key indicators, however, with the changing and widening museum activities, new indicators will be developed.