



SLOVENSKI STANDARD

oSIST ISO/DIS 21246:2019

01-oktober-2019

Informatika in dokumentacija - Ključni kazalniki za muzeje

Information and documentation - Key indicators for museums

Information et documentation - Indicateurs clés des musées

Ta slovenski standard je istoveten z: ISO/DIS 21246:2019

<https://standards.iteh.ai/catalog/standards/sist/9e160d98-3eb6-4a77-8c17-33b42f2b382/sist-iso-21246-2021>

ICS:

01.140.20 Informacijske vede Information sciences

oSIST ISO/DIS 21246:2019

en,fr,de

DRAFT INTERNATIONAL STANDARD

ISO/DIS 21246

ISO/TC 46/SC 8

Secretariat: KATS

Voting begins on:
2019-04-11Voting terminates on:
2019-07-04

Information and documentation — Key indicators for museums

Information et documentation — Indicateurs clés des musées

ICS: 01.140.20

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Reference number
ISO/DIS 21246:2019(E)

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Published in Switzerland

Contents

Page

Foreword	iv
Introduction	v
1 Scope	1
2 Normative references	1
3 Terms and definitions	1
4 Functions and quality aspects of museums	12
4.1 Core functions of museums.....	12
4.2 Quality aspects of museums.....	13
5 Key indicators for museums	13
5.1 General.....	13
5.2 Criteria for museum indicators.....	14
5.3 Use of museum indicators.....	14
5.4 Selection of museum indicators.....	15
5.5 Comparability of results.....	15
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.....	16
5.6.5 Scope.....	16
5.6.6 Definition of the indicator.....	16
5.6.7 Method.....	16
5.6.8 Interpretation and use of results.....	16
5.6.9 Source(s).....	16
6 List of key indicators for museums	17
6.1 General.....	17
6.2 Museum functions and key indicators.....	17
6.3 List of key indicators for museums.....	18
Annex A (normative)	20
Annex B (informative) Checklist of additional information for the quality assessment of museums	65
Bibliography	67

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).

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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.

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.

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](#) specifies how the indicators shall be calculated and used. Annex B lists additional statistical information for the quality assessment of museums.

This document has been developed in close cooperation with ICOM (International Council on Museums) and takes advantage of, particularly, the work of EGMUS (European Group on Museum Statistics).

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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

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 18461:2016, *International museum statistics*

3 Terms and definitions

For the purposes of this International Standard, 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.

ISO/DIS 21246:2019(E)

[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, bequest, transfer or fieldwork

[SOURCE: ISO 18461:2016, 2.5.2]

3.5 capital expenditure

expenditure which results in the acquisition 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 terms “all known” have 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 terms “all known” have 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, 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

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 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 are included.

[SOURCE: ISO 18461:2016, 2.5.13]

3.13**digital object**

object that has been digitally created or digitized by the museum or has been acquired in digital form

Note 1 to entry: Documents are included.

[SOURCE: ISO 18461:2016, 2.5.14]

3.14**digitization**

process of converting analogue materials into digital form

[SOURCE: ISO 2789:2013, 2.3.15]

3.15**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 are included.

[SOURCE: ISO 18461:2016, 2.5.15]

3.16**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.]

3.17**donation**

gift

acquisition without monetary compensation but with change of ownership and legal title

[SOURCE: ISO 5127:2017, 3.6.2.2.11]

ISO/DIS 21246:2019(E)

3.18**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/DIS 21248:2018, 3.22, modified — the terms “in library and information use” have been excluded and the terms “and knowledge” added. Note 2 to entry has been omitted.]

3.19**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]

3.20**efficiency**

measure 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 11620:2014, 3.16]

3.21**evaluation**

process of determining the effectiveness, efficiency, utility and relevance of a service or facility

[SOURCE: ISO 11620:2014, 3.19]

3.22**event**

pre-arranged singular 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 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]

3.23**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]

3.24

full-time equivalent

FTE

a 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]

3.25

goal

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

[SOURCE: ISO 11620:2014, 3.24]

3.26

income generated

income generated by museum operations and from fees, charges, subscriptions and donations

[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.]

3.27

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]

3.28

inventory control

process of establishing the physical presence of all objects in a museum for which that museum has custody and is legally responsible

Note 1 to entry: This includes objects in the collection, objects on loan to the museum, and objects in custody of the museum.

[SOURCE: ISO 18461:2016, 2.8.8]

3.29

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]

3.30

mission

statement approved by the authorities formulating the organization's goals and its choices in services and products development

[SOURCE: ISO 11620:2014, 3.33]

ISO/DIS 21246:2019(E)

3.31**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]

3.32**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”.]

3.33**museum key indicator**

numerical, symbolic or verbal expression assessing the activity of a museum in view of its mission

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

3.34**museum site**

location of a museum

Note 1 to entry: Only sites operated by the museum itself are included.

[SOURCE: ISO 18461:2016, 2.1.6]

3.35**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”.]

3.36**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.]

3.37**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 are included.

[SOURCE: ISO 18461:2016, 2.5.24]

3.38**objective**

specific target for an activity to be attained as a contribution to achieving the goal of an organization

[SOURCE: ISO 11620:2014, 3.34]

3.39**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.]

3.40**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]

3.41**open access**

unrestricted access to information, documents 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.]

3.42**opening hours**

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

[SOURCE: ISO 18461:2016, 2.6.4]

3.43**operating expenditure**

ordinary expenditure

expenditure incurred in the running of a museum

Note 1 to entry: Operating expenditure refers to money spent on staff and on resources that are used and replaced regularly. This includes expenditure on employees, rent, computer network (operations and maintenance), telecommunication, building, maintenance, utilities (electricity, water, sewage, heating, etc.), repair or replacement of existing furnishings and equipment, events, etc. This can also be termed 'current' or 'recurrent' expenditure. When applicable, local and national sales/purchase taxes [e.g. Value Added Tax (VAT)] are included.