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Information and documentation — Key indicators for museums

Information et documentation — Indicateurs clés des musées

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Contents

Foreword

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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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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 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).

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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

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]

357
travelling exhibition
exhibition that is shown consecutively in several locations

[SOURCE: ISO 18461:2016, 2.4.19]