

Mu.SA
museum sector alliance

Key Performance Indicators (for museums)

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This Lesson is about Museum Performance Management. It is about

- Developing performance metrics in order to provide a view of an organization from various perspectives,
- Following an improvement process with the efficient and effective delivery of high and consistent standards of performance.

At the end of this presentation, you will be able to:

- Understand how to define key performance indicators for museum metrics
- Discuss frameworks for a strategic measurement and management system in a museum context
- Differentiate between various methods and tools for performance measuring

Search Metrics



KPI summary for Jun 18th-Jul 18th, and % change from May 19th-Jun 17th

555ms

Load time (5.3%)



20.5%

Zero results rate (0.0%)



245M

API usage (-1.6%)



35.6%

User engagement (1.2%)



Key Performance Indicators

- **User-perceived load time** If our search is fast and snappy, then more people will use it!
- **Zero Results Rate** If a user gets zero results for their query, they've by definition not found what they're looking for.
- **API usage** We want people, both within our movement and outside it, to be able to easily access our information.
- **User Engagement** (not quite **User Satisfaction**) This is an augmented version of clickthrough rate. In it we are including the proportion of users' sessions exceeding a pre-specified threshold. **Note** that we deployed v2.0 of the satisfaction schema on 9/2/2015.

[[File:Discovery Dashboards - Search Metrics - KPIs Summary.png|Discovery Dashboards - Search Metrics - KPIs Summary]]



Metrics

A metric is a meaningful measurement taken over a period of time that communicates vital information about a process or activity, leading to fact-based decisions.

Metrics are usually specialized by the subject area.

In business, they are sometimes referred to as key performance indicators (KPI). Performance metrics should be constructed to encourage performance improvement, effectiveness, efficiency and appropriate levels of internal controls.

They should incorporate “best practices” related to the performance being measured.

<https://www.associationforum.org/mainsite/browse/professional-practice-statements/performance-measurement-metrics>

Search Metrics



Month





Year

June

2017

Show previous month

Show previous year

KPI	June 2016	May 2017	June 2017	MoM	YoY	Monthly Median
User engagement	36%	35%	36%	+2.86%	0.00%	
Zero results rate	23%	21%	21%	0.00%	-8.70%	
API Usage	126.83M	249.99M	244.22M	-2.31%	+92.55%	
Load time	416ms	518ms	555ms	+7.14%	+33.41%	

Monthly Metrics

This tab is to make it easier to update [Wikimedia Product wiki page](#) and the accompanying slide decks for [WMF metrics and activities meetings](#) with last month's KPIs and month-over-month (MoM) & year-over-year (YoY) changes.

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<https://commons.wikimedia.org/w/index.php?curid=61188513>



Terms and keywords

A good metric

- Drives appropriate action
- Meaningful to the customer (member, donor, etc.)
- Simple, understandable, logical and repeatable
- Clearly defined
- Data that's economical to collect

Shows how organizational goals and objectives are being met

<https://www.associationforum.org/mainsite/browse/professional-practice-statements/performance-measurement-metrics>

Section title

“SMART” test



“SMART” test

Since it is not resource-effective to measure everything, organizations should therefore select and monitor the key metrics.

To identify those key metrics you must identify your key work processes or those processes which create the most value for the organization.

To identify those, look at those products and/or services you provide to your members and document the internal steps that design, produce, and deliver those products and services. Then consider the support processes that make these member-driven processes possible, such as your key support processes in sales, marketing, finance, human resources, IT, etc.

Once you’ve identified your key processes and their current state, identify areas to improve (desired state), and determine measurements to bridge the gap.

You will want to provide training for staff on how to develop metrics.

Metrics should pass the “SMART” test, in that they should be Smart, Measurable, Attainable, Realistic and Timely.

<https://www.associationforum.org/mainsite/browse/professional-practice-statements/performance-measurement-metrics>

Section title

Ask the following questions when developing performance metrics

Ask the following questions when developing performance metrics

1. Is the metric objectively measurable?
2. Does the metric include a clear statement of the end results expected?
3. Does the metric support member requirements, including compliance issues where appropriate?
4. Does the metric focus on effectiveness and/or efficiency of the system being measured?
5. Does the metric allow for meaningful trend or statistical analysis?
6. Have appropriate industry or other external standards been applied to the metrics?
7. Does the metric include milestones and/or indicators to express qualitative criteria?
8. Are the metrics challenging but at the same time attainable?
9. Are assumptions and definitions specified for what constitutes satisfactory performance?
10. Have those who are responsible for the performance being measured been fully involved in the development of this metric?

<https://www.associationforum.org/mainsite/browse/professional-practice-statements/performance-measurement-metrics>

Ask the following questions when developing performance metrics

While not comprehensive, a list of some common areas measured by association metrics include:

- membership numbers,
- event and education attendance,
- growth in certification programs,
- member satisfaction,
- service and benefit usage,
- grants and scholarships utilized,
- media imprints,
- Web site trends,
- impacts of advocacy programs,
- retail sales, and
- sponsorships.

<https://www.associationforum.org/mainsite/browse/professional-practice-statements/performance-measurement-metrics>

Section title

Balanced Scorecard Metrics system (BSC)

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An alternate system for developing metrics is the Balanced Scorecard Metrics system (BSC). It was developed by Dr. Robert Kaplan (Harvard Business School) and Dr. David Norton in the early 1990s. Traditional performance metrics provide information on an organization's past results. BSC, by contrast, can better predict future performance or how well the strategic plan is being executed.

The BSC process is a continuous, cyclical process focused on internal processes and external outcomes. The system's control is based on performance metrics that are tracked continuously over time to look for trends, best and worst practices, and areas for improvement. It delivers information to managers for guiding their decisions.

BSC provides a view of an organization from four perspectives:

1. User (voice of the customer/member)
2. Financial objectives
3. Internal processes
4. Change & growth potential

<https://www.associationforum.org/mainsite/browse/professional-practice-statements/performance-measurement-metrics>

Balanced Scorecard Metrics system (BSC)

From each of these four perspectives the organization must define its strategic objectives. It should then define three or four elements it will measure for each objective and define the target value sought for each measure.

Lastly, the organization should define the initiatives it will undertake to reach those targets.

BSC relies on a well-defined strategy and an understanding of the linkages from objectives to initiatives.

Organizations should identify both past and lagging measures that can be used as a measure for future performance. Finally, organizations should determine those measure most appropriate for their goals and not simply adopt the successful metrics of another organization.

<https://www.associationforum.org/mainsite/browse/professional-practice-statements/performance-measurement-metrics>

Section title

Six Sigma Process

Six Sigma Process

Six Sigma is another tool organizations can use to help them improve work flow, minimize redundancy and inefficiencies, and improve the quality of the customer experience.

Six Sigma is a blend of metrics and strategy, changing data into knowledge that leads to new opportunities.

Six Sigma's success within an organization is having the core concepts be integrated into the overall business strategy.

"Six Sigma should not replace other initiatives, but instead offer a tactical methodology to determine the best approach for a given situation/process." (Breyfogle, et. al, 2001).

After reviewing the various tools, it will be up to the organizational leadership to decide which tool works best for you.

<https://www.associationforum.org/mainsite/browse/professional-practice-statements/performance-measurement-metrics>

Six Sigma Process

Six Sigma stands on the basic premise: Define, Measure, Analyze, Improve, Control (DMAIC). This is the problem solving approach often used by those who implement the tool.

Define: This is the overall problem definition. This should be as specific and complete as possible.

Measure: Accurate and sufficient measurements and data are needed. Data are the essence of many Six Sigma projects.

Analyze: The measurements and data must be analyzed to see if they are consistent with the problem definition and to see if they identify a root cause. The problem solution is then defined.

Improve: Once a solution is identified, it must be implemented. The results must then be verified with independent data. Past data are seldom sufficient.

Control: A verification of control must be implemented. A robust solution will be easier to keep in control than a qualitative solution. (Brusse, 2010)

<https://www.associationforum.org/mainsite/browse/professional-practice-statements/performance-measurement-metrics>

Section title

The discussion on how to measure the success of museums

The discussion on how to measure the success of museums

Quality and excellence demand the efficient and effective delivery of high and consistent standards of performance.

To achieve this, managers need to agree on how to measure performance in order to define what is being measured and how it will be measured, as well as the establishment of models of good practice to help deliver measurable improvements.

Using data collected through in-depth interviews with museum executives in London, New York, and Washington, DC, this paper seeks to advance the discussion on how to measure the success of museums, and demonstrate that a performance framework is potentially useful in forging a culture of excellence that will permit museums to learn from each other's experience.

<https://www.tandfonline.com/doi/abs/10.1080/09647771003737273>

Section title

Evaluating the organizational performance and social impact of third sector organizations

Evaluating the organizational performance and social impact of third sector organizations

The need for measuring and evaluating organizational performance and social impact of third sector organizations (TSOs), with the ultimate goal of improving the degree to which their mission and objectives are achieved, has turned into one of the most popular issues in professional and academic forums during the last decade, together with the subjects of transparency and accountability. Research has suggested a significant consensus within the third sector about the convenience of evaluating (measuring to improve) for tactical, strategic and ethical reasons. As the century advanced, focus shifted from measurement to evaluation, from efficiency to effectiveness, and from internal, operating performance measures to external, mission-related impact indicators (Sawhill and Williamson, 2001).

https://pdfs.semanticscholar.org/9307/8c08c97e145f14af9a54cf71062042fe5d3e.pdf?_ga=2.79187356.942277958.1562574800-703486579.1559046492

Evaluating the organizational performance and social impact of third sector organizations

Researchers are working

- in order to come up with a general typology of approaches and indicators (Walker Information, 2002; World Economic Forum, 2003; LBG, 2004; Salamon et al., 2004). Main typologies would include quantitative vs qualitative, performance vs impact/influence/leverage, and efficiency vs effectiveness indicators. Evaluation focus could be set upon results (outputs and outcomes), performance (KPIs or Key Performance Indicators, BS or Balanced Scorecard) or benchmarking with competitors/best practices/indexes.
- to draw common features out of the most (un)successful evaluation experiences in order to propose a best-practice repertoire. This repertoire would suggest evaluation procedures to be participatory, strategically aligned, trustbased, flexible, proactively communicated, transferable, full-cost funded, focused, proactive, and oriented towards continuous improvement.

Museum organizations need both evaluation and communication techniques to successfully manage the expectations and the perceptions stakeholders have upon them, in order to maximize their value to society. Their customer-orientation would be mediated only by their mission and values, as they cater for the most demanding client, i.e. society (Bruce, 2005).

https://pdfs.semanticscholar.org/9307/8c08c97e145f14af9a54cf71062042fe5d3e.pdf?_ga=2.79187356.942277958.1562574800-703486579.1559046492

Section title

The use of Performance Indicator for culture organizations

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Performance indicators are a means of measuring performance and are a useful accountability tool. Generic performance indicators are useful, however some performance indicators may need to be developed specifically for use in museum operations.

Performance indicators have always been problematic for museums, as their principal purposes do not easily translate to the sorts of activities that performance indicators are generally developed to measure.

In 1990 the Museums Association in the UK adopted a policy, which recognised the benefits that could be derived from their use particularly as part of museum planning.

The Museums Association recommended that the performance of a museum be considered in the four key areas of: collections, communications, operation and external services.

<http://museum.wa.gov.au/research/development-service/performance-indicators>

National Museum of Ireland, Statement of Strategy– Review completed Oct 2010 (Objectives, Strategies, Projects and Key Performance Indicators 2008 – 2012)

<https://www.museum.ie/NationalMuseumIreland/media/Corporate-Information/Statement%20of%20Strategy/FINAL-SOS-REVIEW-October-2010.pdf>

The use of Performance Indicator for culture organizations

VICTORIA AND ALBERT MUSEUM - April 2013 to March 2014

This report covers all 28 performance indicators (PIs) collected by the V&A. 11 are included in the V&A's Management Agreement with DCMS (2 are DCMS Key Performance Indicators (KPI1 and KPI25) and 9 are DCMS PIs and the remaining 17 are V&A PIs.

TOTAL VISITS, USERS, OVERSEAS, AND REPEAT VISITS

DIGITAL

CHILDREN AND CHILD LEARNERS

LEARNERS

LOWER SOCIO-ECONOMIC

BAME (BLACK, ASIAN, AND MINORITY ETHNIC)

CREATIVE INDUSTRIES

VISITOR SATISFACTION

LOANS & TOURING EXHIBITIONS

RESEARCH AND ADVICE

FINANCIAL

WORKFORCE

https://www.vam.ac.uk/_data/assets/pdf_file/0018/243351/unding-Agreement-End-of-Year-Report-2013-14.pdf

The use of Performance Indicator for culture organizations

Victoria and Albert Museum Annual Report and Accounts 2017-2018
Performance against strategic objectives: Summarizing the V&A's performance against the five objectives outlined in the five-year strategic plan.

CREATE A WORLD-CLASS LEARNING AND VISITOR EXPERIENCE
ACROSS ALL V&A SITES
AND COLLECTIONS
FOCUS AND DEEPEN THE RELEVANCE OF OUR COLLECTIONS TO THE
UK CREATIVE AND KNOWLEDGE ECONOMY
EXPAND THE V&A'S INTERNATIONAL REACH, REPUTATION AND
IMPACT
SHOWCASE THE BEST OF DIGITAL DESIGN AND DELIVER AN
OUTSTANDING DIGITAL EXPERIENCE
DIVERSIFY AND INCREASE PRIVATE AND COMMERCIAL FUNDING
SOURCES

<https://vanda-production-assets.s3.amazonaws.com/2018/07/18/10/54/31/2e78a797-70aa-4a6d-a6c4-db71a4ffa8b0/VAAR%20-%20final%20web%20version%2018%2007%202018.pdf>

The use of Performance Indicator for culture organizations

In times of dwindling resources and a general demand for accountability, libraries have to show the results of the funding spent on their services.

Such results can on the one hand be documented by output data like number of issues or reference answers, on the other hand by qualitative indicators that assess the speed, correctness, or cost effectiveness of service delivery and the users' satisfaction with the services.

But neither the quality of library services nor the quantity of their use gives evidence as to the impact on users.

What funding institutions would actually like to know is whether the existence of a library can further the goals of the institution or community it belongs to, whether learning and research, professional work or communal life benefit by library use. To find answers to such questions, libraries should be able to demonstrate not only their output, but also their outcome.

<https://www.liberquarterly.eu/articles/10.18352/lq.7746/>

The use of Performance Indicator for culture organizations

A few remarks can be drawn from main issues arising from the design and use of performance indicators for culture organizations.

1. There is no such thing as 'the performance' of cultural institutions, or of the whole sector. There are different aspects of performance that can be evaluated also with the help of numerical indicators, but none of these can provide an exhaustive representation of the functioning of arts organizations.
2. Indicators are a way of organizing information on the different aspects of performance and they are characterized by quantification. One must be aware that the significance of this quantification may vary according to the different objects of measurement, and also because of the different 'quality' of data that are used to compute them.
3. Performance indicators need to be used with great caution, and the actual implementation of a system of indicators must be carefully designed. The quantification allowed by indicators should not induce us to use them in a direct and uncontrolled prescriptive way, as they would be, for instance, if one employed the scores to rank institutions from the best to the worst. Indicators provide only a piece of information, which must be accompanied by other relevant information useful for interpreting the determinants of performance.
4. Once used, indicators are not merely a computation exercise, since they tend to affect the behaviour of institutions according to the incentives arising from the prediction about their possible utilization.

<https://core.ac.uk/download/pdf/18507452.pdf>



The use of Performance Indicator for culture organizations

The museum sector is characterized by a series of features which make this field very challenging. One of these features is the fact that we have to look at the museum product as at the multidimensional product, since cultural goods have two-ply character, they are artistic and economic product at the same time.

Moreover the measuring of the quality in art museum is difficult activity, it is hard, sometimes even impossible, to set a series of indicators and also obtain proper data.

Nowadays it is almost necessary to integrate performance measurement system in organization's strategy decision making. The museum managers feel the pressure to prove that their organization is performing well by various stakeholders and we perceive the idea that multidimensional performance measures could fill the informational gap concerning performance, quality, and the artistic value of cultural programs.

The performance of museum consists of financial performance and qualitative issues, two sets of performance that are targeted by radically different measures and valuation practice. The aim of selected studies is to propose a comprehensive multidimensional model to assess art museum activities. These models take into account the scope and character of museum's mission.

<https://docplayer.net/50443987-A-multidimensional-assessment-framework-for-art-museums.html>

<https://docplayer.net/14383091-Using-a-balanced-scorecard-in-a-nonprofit-organization.html>

Museum cases



Key Intangible Performance Indicators

A KIPI is the mojo that sets a high performing organization apart from others. Intangible aspects like good decision-making, artistic and managerial expertise, reputation and relationships, intellectual capital, and the quality of the work force all influence an organization's performance.

We call them KIPIs, or Key Intangible Performance Indicators. Because these traits are, by nature, intangible, we cannot easily observe and measure them. And yet we all know how important they are. By using a statistical technique that we call "high performance frontier analysis," we can estimate how much these intangibles play a role in setting an organization apart from others. This is a method that has helped many other industries understand high performance and the best practices that drive it.

For arts and cultural organizations, we adjust the playing field for numerous organizational characteristics, like budget size and age, since we know that older and larger organizations tend to have higher performance on many performance measures. The organization's community plays a role, too, so we adjust the starting point for those characteristics, too.

Even when the playing field is as level as we can get it, organizations still perform differently than one another. With KIPIs, we can estimate just how much of performance was due to expertise by measuring how far a score is from what we'd expect it to be given the organization's operating characteristics and conditions. Moving forward, we will begin to explore and understand what the secret is to success for high-performing organizations for those who want to achieve similar results. Not everyone will want high performance on every measure. Each organization will have its own sense of priorities.

<http://mcs.smu.edu/artsresearch2014/articles/about/report/5-identifying-high-performance-and-key-intangible-performance-indicators-kipis>

The Balanced Scorecard has been examined as a Performance Management Tool for Museums

This chapter examines the impact of the design and implementation of the BSC concept on the development of performance measurement and management of museums.

The main focus relies on the BSC design and the elements of implementation that enable the communication of strategy between the management of an organisation and its different departments.

These issues are discussed based on the experiences of a central museum in Estonia.

https://link.springer.com/chapter/10.1057/9780230361553_16

This lesson examines the impact of the design and implementation of the KPI concept on the development of performance measurement and management of museums.

Learners should try to measure the impact and value of their organization activities.

They are also assessing the use of standard metrics, consistent tools and clear guidelines to measure their organizations' performance.

List of references

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