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Performance Management (for museums)

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Aim and objectives

This Lesson is about Museum Performance Management. It is about

- reviewing methodologies for performance measures and
- establishing a set of common tools (effectiveness measures) for evaluating and determining success indicators for exhibitions, education programs, special events, and general visitation that are specific, measurable, achievable, realistic, and time bound.

Learning outcomes

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

- Sketch a report on the value of museum services through demonstrable performance indicators and impacts.
- Understand a broadened and more secure framework of improving effectiveness of programs, improving revenue generation, and greater accountability and relevance.
- Acquire a broadened awareness of measuring the success of exhibitions and programs at each museum with regular and systematic review of objectives, outcomes, evaluation strategies, and success indicators.
- Discuss performance measurements of exhibitions, programs and visitor experiences in regard to improving effectiveness, efficiency, service delivery, and ability for innovation

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Studies of management and organization



Economy - Efficiency - Effectiveness

Business experts usually discuss the cultural policy and impacts of the application of performance indicators to museums and subsidised arts organisations.

The context of Graeme Evans's study was the increased accountability and measurement of the outputs of arts organisations by government funding agencies, and the related drive for improved productivity and efficiency.

In an extension of performance measurement regimes in 'public good' provision, and the arguments concerning economic importance of the cultural industries, the performing arts occupy an uncomfortable place as a pre-industrial activity being subjected to notions of economic efficiency. This discussion concerns the focus for analysis of the measurements used – the three-Es of economy, efficiency and effectiveness - and the rationale underlying their imposition.

(Graeme Evans, Measure for measure: evaluating performance and the arts organisation, Studies in Cultures, Organizations and Societies, Volume 6, 2000 - Issue 2) <https://www.tandfonline.com/doi/abs/10.1080/10245280008523549>

Progress - Success – Staff's effectiveness

Every nonprofit organization should measure its progress in fulfilling its mission, its success in mobilizing its resources, and its staff's effectiveness on the job.

The American Museum of Natural History, for example, is dedicated to “discovering, interpreting, and disseminating—through scientific research and education—knowledge about human cultures, the natural world, and the universe.” But though the museum carefully counts its visitors, it doesn't try to measure its success in discovering or interpreting knowledge. How could it? The pace of scientific discovery hardly depends on the activities of a museum—even one as prominent as this.

Although nonprofits will never resemble businesses that can measure their success in purely economic terms, we have found several pragmatic approaches to quantifying success, even for nonprofit groups with highly ambitious and abstract goals. The exact metrics differ from organization to organization, but this thorny problem can be attacked systematically.

(John Sawhill and David Williamson, *Measuring what matters in nonprofits*, McKinsey Quarterly, 2001)

<https://www.mckinsey.com/industries/social-sector/our-insights/measuring-what-matters-in-nonprofits#sidebar1>

The performance of museums

This article investigates the performance measurement and evaluation practices of cultural organizations and inquires how "performance" is understood, measured, and communicated to various stakeholders. We analyze the practice of performance measurement in two in-depth case studies of European museums of contemporary art.

The performance of museums consists of financial performance and qualitative issues, two sets of performance that are targeted by radically different measurement and evaluation practices. The former is more company-like and includes the measurement of organizational efficiency. The latter comprises professional judgments.

As in any other organization, both sets of performance are the basis for operative and strategic decisions concerning strategies and budgets. In addition, they provide the basis for various reports to external constituencies. As the consequences stemming from these decisions are severe, an accurate information-generation process and adequate performance measurement systems are essential.

(Gstraunthaler, Thomas and Piber, Martin, The Performance of Museums and Other Cultural Institutions, International Studies of Management and Organization, Volume 42, 2012 - Issue

Performance evaluation practices in arts and cultural organizations

There is a significant amount of financial and management accounting literature on the arts and cultural sector.

Francesco Chiaravalloti's objective was to understand to what extent this literature is able to offer a critical perspective on the study of performance evaluation practices in arts and cultural organizations, as it is currently missing in the arts management literature.

Adopting a critical perspective means shifting the focus of research from the technicalities of evaluation rules and procedures to their embodiment by the different organizational and societal actors of the arts and cultural sector.

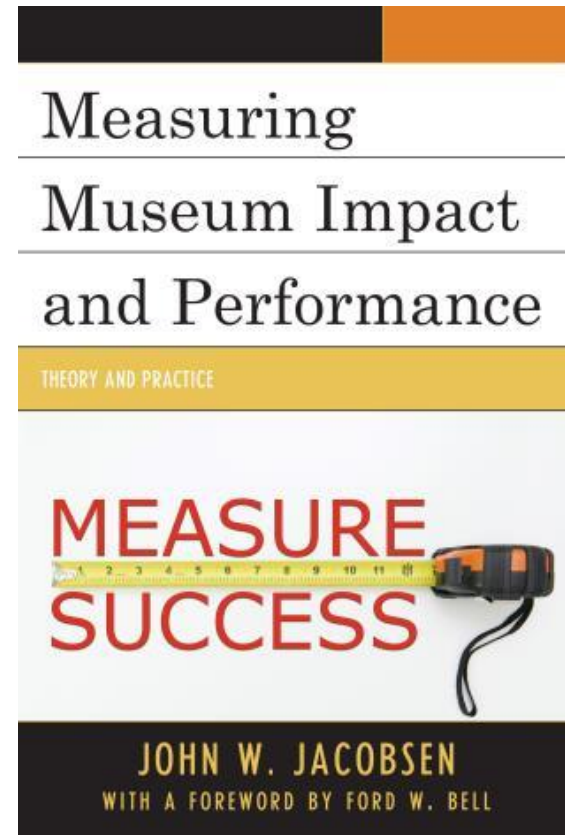
(Francesco Chiaravalloti, Performance Evaluation in the Arts and Cultural Sector: A Story of Accounting at Its Margin, The Journal of Arts Management, Law and Society, Volume 44, 2014 - Issue 2) <https://www.tandfonline.com/doi/abs/10.1080/10245280008523549>

A range of world leading authorities and museum experts are involved on Business economics and Museum administration.

This is the example of museum analyst and planner John W. Jacobsen. He provides both the theoretical underpinnings and the operational pragmatics of measuring any museum's intentional impact and performance by using 1,025 indicators drawn from 51 expert sources.

Knowledge on measuring museum impact and performance provides museum professionals with a clear, very open process that will improve their museum's value and performance by selecting indicators that monitor whether they are realizing their desired public, private, personal and institutional values. The framework recognizes that each museum needs to decide on its own purposes and priorities.

<https://rowman.com/ISBN/9781442263291/Measuring-Museum-Impact-and-Performance-Theory-and-Practice>



Jacobsen, J.W., Measuring Museum Impact and Performance, Rowman & Littlefield Publishers, 2016

Evaluation: A management framework



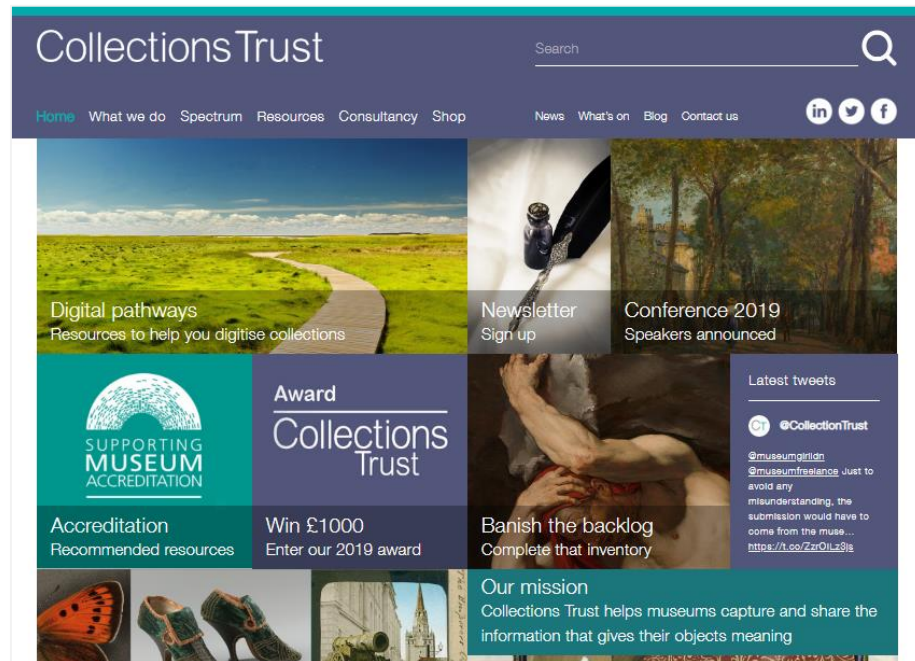
Why tracking performance across the museum:

- Creating a culture of continuous improvement
- Strategic resource / planning management
- Identifying and mitigating risk on current activity
- Informing future development
- Evidencing Return on Investment
- Demonstrating value and supporting cost/benefits
- "What gets measured, gets managed"

Strategic management is about developing integrated and holistic management methodologies and indicators which support:

- The delivery and evidencing of public value
- The need of accountability
- Organization resilience
- Collections sustainability

<https://www.slideshare.net/nickpoole/performance-management-in-museums>



<https://collectionstrust.org.uk/>

Evaluation: A management framework

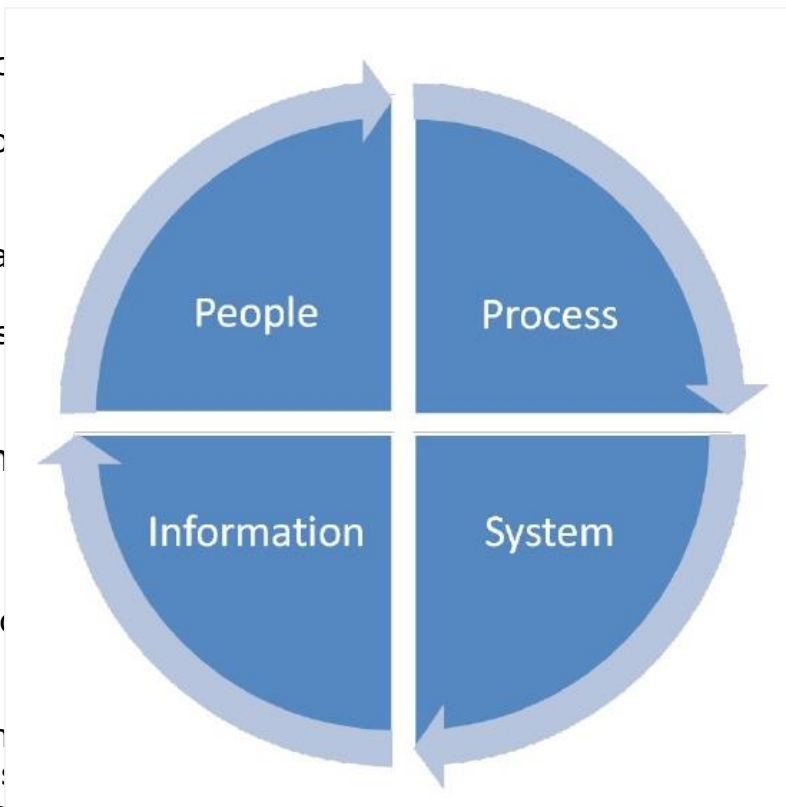
Conceptual model of an organization includes Information, People, Process, System.

- People use systems to implement processes which generate information.
- It is an holistic view -each of these elements acts on the other.
- Efficiency comes when they exist in balance.
- Value comes when they are motivated towards an external purpose.
- Sustainability comes when they can adapt in response to emergent needs.

Conceptual model of museum function describes Develop, Care, Use, Learn.

- Museums have traditionally been presented as a balance between assets and preservation.
- This misses both the emergent / dynamic nature of what we do, and the intellectual capital which is generated.
- Cultural value emerges from the interaction of caring for material, acquiring and developing collections, promoting their use and developing new knowledge from them.

<https://www.slideshare.net/nickpoole/performance-management-in-museums>



Evaluation: A management framework



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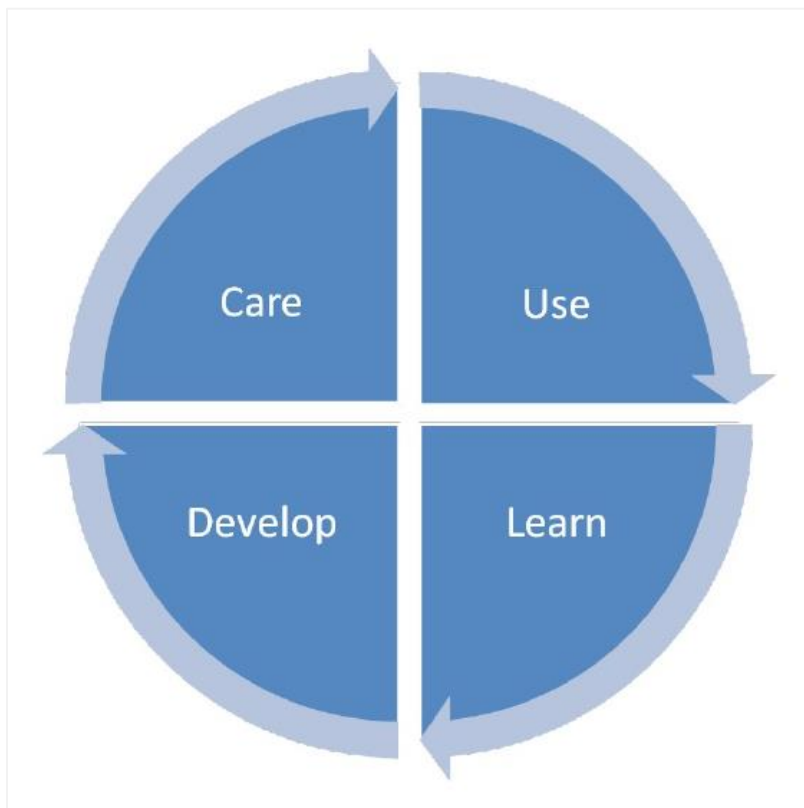
Models adopted by museums

- Use indicators (quantitative data on loans)
- Balance scorecards
- Value/impact indicators for specific activities (learning, outreach)
- Quantitative indicators for specific activities (web stats)
- Footfall
- CPA Local Authority Performance Indicators
- DCMS Key Performance Indicators
- Significance assessment
- "Advocacy" Indicators
- CPA Indicators

Incorporation of museums into Local Authority performance assessment - indicators:

- Volunteers (quantitative)
- Participation by priority groups (quantitative & qualitative)
- Participation - online access (quantitative)
- Learning (quantitative & qualitative)
- Satisfaction (qualitative)
- Value for money (cost per user)
- Accreditation (assessment)

<https://www.slideshare.net/nickpoole/performance-management-in-museums>



DCMS KPI

Performance monitoring of DCMS sponsored bodies:

- Access (visitors statistics incl. online)
- Audience profile (socio-economic and demographic)
- Learning and Outreach (quantitative by profile)
- Visitor satisfaction (% of visitors who would recommend)
- Income generation (proportion of income by source)
- Regional engagement (distribution of loan agreements)

<https://www.slideshare.net/nickpoole/performance-management-in-museums>

This lesson enhances the development of a common understanding of museum performance measures vocabulary and methodologies.

We want to emphasize the use of methodologies to measure performance in a number of selected areas.

Use of project and exhibition briefs as a means for measuring the success of exhibits/exhibitions, education programs (including education kits), and special events (such briefs would include the delineation of outcomes and performance indicators, and other evaluation tools)

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