ExhibitionScorecard

Measuring success with metrics

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Introduction

For many years, the Austrian Museums Association has been looking into the question of what museums can use as a measure of success instead of visitor numbers, because – apart from the fact that the museum community is generally reluctant to talk about numbers – it is precisely the visitor number that is an unsatisfactory metric for making statements about the quality of an institution. Museums have an educational and research mandate they need to fulfill, but relevant topics are not always the ones that draw the crowds. It is also important to remember that what appeals to large amounts of people does not necessarily have to be of high museological quality and meet the museums' own standards. However, since the concept of visitor numbers is particularly easy to comprehend for stakeholders, especially sponsoring organizations and funding providers, it remains the most requested metric in the museum sector. It therefore comes as no surprise that museums are reluctant to present niche productions or difficult-to-sell research results on any significant scale. From a business point of view, it makes more sense to opt for cash cows and stars. The fact that museums as custodians of the artistic, cultural and natural heritage of a region, a country or state cannot per se be economically profitable[1] should actually give them enough artistic and scientific leeway to align their exhibition practice with their collection and also dare to go for experiments.

One should also bear in mind that museums as 'creative agencies' have an inherent and thus understandable aversion to measuring success – in the creative laboratory, one is keen to study and experiment and not apply the yardstick to

1 Apart from museums that are highlights for cultural tourism and often generate a significantly higher self-sustainability rate, the average self-sustainability rate of a museum is around 10 to 15 percent. This can be considerably higher with museums that operate on a volunteer basis, since there are no personnel costs.

everything.[2] Nevertheless, we can't do completely without numbers, which is why the Austrian Museums Association has developed a MuseumScorecard based on the Balanced Scorecard (BSC), the quintessential management tool (www.museums-scorecard.at). Developed by David P. Norton and Robert S. Kaplan in the late 1980s as a performance measurement system, the BSC aims to use monetary and non-monetary indicators to reflect a balanced view of corporate objectives. Typically organized in four perspectives (financial, customers, internal processes, research and development), BSC combines objectives, metrics, targets and measures that are intended to lead to the desired business success (Kaplan and Norton 1992).

Aim of the method

The idea of the BSC was further developed by the board of Austrian Museums Association as a tool for measuring the quality of institutions as well as for internal design processes and external reporting in several workshops that were organized by the ICG Integrated Consulting Group, Graz, taking into account the everyday practice of the museum. The key performance indicators considered important in the workshops were assigned to nine perspectives, which are to be understood as offers for further in-depth analysis. Not every perspective is equally relevant for individual museum or exhibition organizations.[3] The museum is considered as:

- a store of cultural memory, in which the behind-the-scenes work involved in collection activities is showcased,
- a site of non-university research, where research projects and research funds are the focus of activities,
- an extracurricular educational institution and a place of lifelong learning that focuses on the visitors,
- an inclusive place for everyone, where accessibility and measures to promote inclusion and diversity are top priorities,

2 Museum management and quality in museums have been pushed out of focus in favor of other topics such as inclusion, participation, digital transformation, and sustainability, partly because there was nothing new to add to the findings that had been published so far. Aside from various books on quality management in cultural organizations and a number of studies on the impact of museums, there is some older recommended reading (Anderson 2004, Fliedl 2011, Nowacki 2005, Reimitz 2013, Walz 2011, Weil 2002). I would also like to refer here to the EU project *MOI Museum of Impact*, in which another extensive quality discourse was launched in 2020–2022, but specific evaluation tools were not used. Website of the MOI Museum of Impact: www.museumsofimpact.eu (05.08.2024).

3 For example, if the organization behind an exhibition is not a museum or does not have its own collection, this perspective is of no relevance.

- an important place of encounter between work and home ('third place'), whose significant features include returning visitors, feedback and barrier-free access,
- a regional cultural institution whose impact is rooted in the region,
- a climate activist that puts the 'green' museum to the test,
- an employer who takes fair remuneration and employee satisfaction into account,
- an economic factor, since our deliberations could not completely ignore money.

This holistic perspective on museum practice enables all museums, regardless of their type and size, to emphasize their unique features and success factors. After all, a regional museum that has only 2,000 visitors per year can be an important regional cultural institution because 80 percent of the visitors come from the direct vicinity and tour the museum with a guided tour. A volunteer museum can be an important social meeting place because several dozen volunteers find meaningful work there. A large museum with many international visitors is a significant economic factor. A museum, no matter what size, that goes on strike for the climate every Friday is an important seismograph of society. A museum with very few staff that handles a large number of loan requests per year is an important preserver of cultural heritage and so on.

The MuseumScorecard is not only a tool to communicate the success of museum practice to external stakeholders, it can also help the team to plan strategies and put visions into practice. It can be an incentive to set up one's own indicators within one's organization as a measure of success, which support the attitude and the goals of the museum. The MuseumScorecard tool is optimized when it is accompanied by a benchmarking process, i.e. a comparison with like-minded and similar museums, in order to better gauge the collected data and to arrive at better or different results through peer consultation and shared experimentation. The best museum practice always comes as joint efforts in the form of cooperation.

Step-by-step guideline

To perform the specific task of analyzing an exhibition, the MuseumScorecard was modified on the indicator level to an ExhibitionScorecard, applying the same perspectives exclusively to the medium of the exhibition, with a clear focus on quantitative analysis. There is, of course, one thing one has to keep in mind: Without comparable data, for instance, from previous years or other projects, the figures are not so (or less) relevant, but they can always be used for setting goals in the team. These metrics are a good means of illustrating the priorities of individual exhibitions or the attitude of the museum team in question. In contrast to the MuseumScore-

card, which, besides general information about the museum organization (figures about the team, budget, visitor numbers etc.), also correlates the figures entered in the perspectives via the programmed database and explains them in graphics, the present attempt at an ExhibitionScorecard solely relies on the significance of the metrics themselves. The ExhibitionScorecard is thus an inventory for each exhibition, which can either be related to a museum mission statement[4] or compared to another exhibition.

In the operational process, the following absolute as well as relative metrics have to be entered in a table:

1. Collection (relevance and visibility of the collection)

- Proportion of the number of exhibited collection objects to the number of items on loan
- Proportion of exhibition space to depository space
- Number of collection objects processed scientifically or conservationally by the exhibition (in relation to the entire collection)
- Number of the digitized and publicly accessible objects[5]

The metrics from the area of the collections reveal the significance of special exhibitions: The smaller the surface area, the more difficult it is to communicate new topics and research results. If only a few objects from one's own collection are used, the topic is probably not one that comes from one's own collection or is not a part of its focus. In the context of exhibition productions, objects can be restored or at least undergo preventive conservation treatment. Exhibitions also offer the opportunity to make objects from the collection accessible to the public beyond the exhibition space through digitization.

2. Research (knowledge production)

- Number of research projects initiated or integrated
- Number of cooperation partners from the field of research and science

4 For example, if the mission statement focuses on inclusion or climate activism, but the ExhibitionScorecard does not show any further activity in these areas, the attitude reflected in the mission statement cannot be detected in the exhibition.

5 This metric represents the data sets provided online in the reporting year. At least the following categories of the object data sheet should be publicly accessible: inventory number, object designation/title, date of access, material/technique, dimensions, artist/maker/producer, dating.

– Number of publications[6]
– Number of hours invested by research staff (internal and external)

The research perspective shows whether and how much in-house but also external research has been included in the project. Exhibitions are also part of the research cycle, as the collections should also be part of knowledge production and the results they produce should be widely presented and discussed.

3. Education (knowledge acquisition)

– Number of analogue and digital educational programmes carried out[7] (tours, workshops, etc.)
– Number of people who participated in educational programmes in relation to the overall number of visitors
– Number of booked school programmes
– Number of cooperating educational institutions[8]

Imparting knowledge is a core task of museums. This offers the opportunity to showcase the great strength of museums – personal education on the principle of dialogue with original objects or at the original location.

4. Inclusive place (museum for everyone)

– Number of inclusive educational programmes and tools
– Number of cooperations with organizations of people with disabilities in the context of the exhibition
– Barrier-free accessible exhibition space in percent
– Number of opening hours per week, of which freely accessible

Museums and exhibitions should be accessible to as many people as possible, which is why the perspective of inclusion is a particularly important factor. All metrics aim to make visible the efforts being made to open cultural institutions to a broader public.

6 Catalogues for permanent or special exhibitions, blog posts, articles in professional journals and publications by external publishers.

7 See: „Digitale Besuchsstatistik – Vorlage eines Zählsheets. Empfehlung der ARGE Digitales Museum im Rahmen des Museumsbunds Österreich“ (“Digital visitor statistics – Submission of a counting sheet. Recommendation of the ARGE Digital Museum as part of the Austrian Museums Association”), http://museumspraxis.at/?p=264 (05.08.2024).

8 Educational institutions include: kindergartens, schools (primary and secondary), vocational schools, colleges, academies, universities, (technical) colleges, etc.

5. Place of encounter ('third place')

- Duration of stay
- Collected feedback, thereof primarily positive
- Number of places to sit and rest (seating) and non-consumption zones[9]
- Number of visitor surveys conducted[10]

Museums are also important places of encounter. The crucial factors here are how much time visitors spend there and whether there are non-consumption zones and sufficient seats where visitors are able to process and discuss what they have seen. Feedback and visitor surveys are used to evaluate the place of encounter. Whoever gives feedback takes an interest.[11]

6. Regional cultural institution

- Visitor number, thereof, visitors from the region
- Number of artists or contributors from the region
- Number of events in the fringe programme
- Number of media reports

The perspective with figures on regional cultural institutions takes into account that museums and their exhibition activities are not only of great importance for (inter)national cultural tourism, but also have great regional cultural significance: this not only evaluates the regional audience, but also how many of the contributors come from the region and whether the exhibition is covered in the local media.

7. Climate (attitude)

- CO_2 emissions per exhibition
- Re-used exhibition furniture in percent
- Number of climate-related topics
- Number of 'green' measures as part of the exhibition[12]

Climate change is also a hot topic in the exhibition community and is reflected in the seventh perspective. While calculating the CO_2 emission is particularly complex,

9 Seats were defined as the metric here.

10 The metric used here is the number of visitors surveyed.

11 Staff from the visitor services or people who – in smaller museum spaces – work at the front desk or information desk can usually provide a very good estimate.

12 Introduction of waste separation systems, electricity and water saving measures, reusable visitor information, etc.

other metrics are easier to quantify: how many environment protection measures were implemented in the exhibition, and how many climate-related topics are included in the exhibition and the educational programme? Is a certain percentage of the exhibition materials available for re-use in-house or elsewhere? This can show a commitment to the principles of the Museums For Future (http://museumsforfuture.org/).

8. Employer (human resources deployed, learning organization)

- Number of staff hours: full-time / freelance / volunteer
- Number of internal evaluation discussions after opening of the exhibition
- Number of the cross-departmental team meetings on the development of the exhibition
- Number of sick days taken during the exhibition production compared to the average number of sick days per year

More than 10, 000 people are employed directly by museums in Austria, both full-time or as volunteers,[13] not including the numerous contractors. This makes it all the more important to take a look at the museum as an employer. In the context of exhibitions, the following questions are of interest besides the hours worked: is the museum a learning organization? Are there evaluation discussions after the opening of the exhibition? Does inter-departmental work precede the staging of an exhibition? Does the exhibition put undue pressure on the team?

9. Economic factor

- Production costs per m^2 of exhibition space
- Self-sustainability ratio for costs of exhibition production in relation to admission revenues plus third-party funds
- Total expenditure per visitor
- Total revenue per visitor

Finally, the economic factor perspective can provide insights into the classic management world of figures: production costs, self-sustainability ratio as well as revenue and expenditure per visitor. The efficient use of mostly public funds should also be relevant within the museum, and in combination with the other perspectives it can be examined whether the use of the funds has paid off (Muchitsch 2018).

13 See: Statistik Austria, „Museumsstatistik", https://www.statistik.at/web_de/statistiken/menschen_und_gesellschaft/kultur/museen_und_ausstellungen/021268.html (05.08.2024).

Constant monitoring and controlling should be a fundamental part of museum management; after all, this is not primarily about measuring success but about the responsible and transparent use of mostly public funds that the museum administers – regardless of whether a museum is run by full-time or volunteer staff, what type of museum it is and how large it is. The degree of sophistication of the systems used (data base, excel sheet etc.) is of little relevance, as long as they always ensure an overview of what has been achieved and spent. This means that a substantial majority of the figures used for the ExhibitionScorecard should be readily available or easy to collect. Many of these can be found in annual museum statistics and internal reporting (annual reports, funding reports etc.) as well as in any existing cash register and booking systems, or are automatically generated in the course of the exhibition's production (e.g. lists of the exhibited objects, restoration reports, condition reports etc.).

For the figures that are not yet available, one can set up a certain routine for collecting the data at the beginning of the exhibition project, as well as the retrograde-analytical data, such as visitor feedback. Compared to qualitative methods, quantitative methods are neither particularly time-consuming nor resource-intensive. Once the team has worked out a procedure or a counting sheet, this form of data collection can be easily and effectively integrated into the museum's daily routine or exhibition practice. One should allow twenty hours for initiating the implementation of this method, while data collection should take a maximum of one hour per perspective.

Case study

A conversation with Peter Nömaier, commercial director of the Sigmund Freud Museum in Vienna, has confirmed that the ExhibitionScorecard is generally considered interesting, since it sheds light on many aspects of exhibition practice and focuses on the core of museum work – the collection and its communication. In museum practice, however, in particular in day-to-day exhibition operations, there are a number of challenges. While visitor numbers, ticket sales, and participants of educational and fringe programmes are constantly monitored, other indicators for internal management-related performance measurement are currently not relevant. There is a lack of time and personnel resources for monitoring further indicators that have so far not been part of the collection process. As a result, Peter Nömaier rather sees the ExhibitionScorecard as a tool that can be used in strategy workshops or annual planning to define selected quantitatively measurable targets for the team already in the exhibition planning stage. The ExhibitionScorecard thus seems to him to be only partially suitable for general quality measurement in the course of the usual exhibition production and runtime, since the amount of resources required for

collecting further indicators appears to be too high in proportion to the knowledge gained. The Sigmund Freud Museum, a medium-sized establishment with around twenty employees, has less staff and infrastructure at its disposal than larger museums. In largescale institutions, which are usually required to present a broader analytical depth in their reporting, the ExhibitionScorecard can be used much more easily and efficiently in normal operation.

Method reflection

On the whole, it should be noted that this method says nothing about the intrinsic quality of the exhibition itself, about the state-of-the-art knowledge on its topic, or how it is communicated through design and storytelling. Rather, the ExhibitionScorecard can, for example, provide information about how the museum's team itself approaches the collection, to what extent it adopts a visitor-centered perspective, what significance it attaches to research and education, and much more. If the ExhibitionScorecard (as well as the more general MuseumScorecard) is regularly used and interpreted and discussed with the people involved, the method contributes sustainably to the further development of both the team and the museum.

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