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**Museums and quality, from the concept of the museum that carries out functions to the museum that provides services\***

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Quality management

**Self-evaluation of the organisation**

Citizens/customers satisfaction

Impact on society evaluation

Key performance evaluation

Good practices comparison (Benchmarking)

Continuous improvement

In professional environments, when quality assessment of museums is discussed, one immediately thinks of the honourableness of the directors and curators, the erudition and specialisation of knowledge, the diversity of the gathered material and study of the collections, the collections conservation methods and environmental control, the regularity and notoriety of the exhibitions and artists, the building's architecture and site, the recreation of environments, the museographic equipment design. We admit that the roles and attributes listed above can contribute to the definition of a specificity of museological *good practice* within a hierarchised functional perspective (the museum functions) and for the classification of museums according to a scale, validated between peers, based on

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\* "The Museum Public in Portugal: characterisation and motivations" [O Público dos Museus em Portugal: Caracterização e motivações]"(POCTI - 33546 ULHT Sociourbanistic Study Centre [*Centro de Estudos de Sociourbanismo da ULHT*]), 2005.

“installed” appreciation criteria, enforced from above downwards, according to the “prestige” of the products and of those who conceive them, but that say nothing about the effective satisfaction of the citizen/customers and the real impact on society. There is a lack of evaluation instruments that would give us a return of all that the museum is and represents in contemporary society, focused on being and on the relation with the other, in detriment of the ostentatious possession and of the doing in order to meet one’s duties. But it is only possible to evaluate something by measurement and comparison, on the basis of well defined criteria, from a common grid, implicating all of the actors in the self-evaluation, in the definition of the aims to fulfil and in the obtaining of results.

In order to take this step the museums will have to, in our understanding, change their self-image, give up the temple where they have always taken refuge in and take up, with no diminution, as an organisation that, among many others, with social responsibility, seeks the recognition that it is due from citizens/customers. This place has to be conquered, but, in order to do so, museums have to gear up with instruments that enable it to act strategically, instead of reacting defensively as eternally misunderstood organisations. It is the community that legitimates the museum’s action, by means of the pertinence of the services provided and not the museum that seeks to impose itself displaying a reportedly inherited “statute” or one that has been arbitrarily conferred. To think of a museum according to the impact on society and to the effective evaluation of results implies in another social order and another organisational culture. This reflection is not new, but its application to the national museological society is far from taking place, despite the recommendations and of the valid contributions and experiments, in international analogous organisation. Consider what William M. Sukel (Illinois University)

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states, in an article titled “Museums as organisations”, published for the first time in 1974 and reissued in 1998, in the compilation “Museum management”, coordinated by Kevin Moore: *In many aspects, the museum shares many characteristics with the entrepreneurial organisations. First, as with all organisations, the museums are geared towards a series of goals (...). Second, the museums reach their goals as an organised structure. Naturally, this means that its activity, carried out in view of the reaching of goals, requires that the others collaborate within a cooperation spirit in order to reach the goal. Work is distributed among the many departments and personnel, and the different coordination models form the structure. The museum director (who could be equated to the company’s director) runs the planning of control and of other functions. Third, it is habitual to find a common functional type of structure. In the business world, the function of the organisation is to produce something ,to sell it and to finance the operation. As a result, functional specialists emerge (people dedicated to sales, production and finance). The museum also relies on functional specialists: curators, commissars etc. (...) The museum’s goals may not seem as tangible, but they are very real. They are of more of social character than economic, according to which the evaluations of the museums should keep in mind the understanding of the correct goals, defined with precision.*

For the last thirty years in Portugal, great changes of political and social nature have been operated, which have inevitably reflected on the way we think museums and their role in society. Apparently, we can state that museums today are closer to the citizens’ needs and expectations. But appearances are often delusive, for they are grounded on optimistic analyses and more or less eloquent reports by those who direct the museums and project themselves passionately on

its image, or else by opportunistic politicians who take it up as a flag of convenience. The eulogy of difference have remitted museums and other institutions of artistic and cultural nature to altars that have become, in the end, economic and social ghettos. So there lies a great contradiction; it is not understood how can the museum, a place where one thinks the world and the far-away and close worlds can excuse itself from addressing the great issue of the contemporary world, namely organisational cultures, communication and knowledge management?

The scientific and conceptual specificity effectively does exist in museums, as in other equally specialised and technically demanding sectors of our society, but it is this surplus-value that cannot serve as an argument to exclude the museums from the organisational logic and from the models of internationally accepted and practiced evaluation models in businesses and services all around the world, with certified results. Victor Middleton, a business consultant, with great experience with museums, in an article published for the first time and reproduced in the compilation of texts titled “La gestión del museo”, coordinated by Kevin Moore, Spanish edition of 1998: (...) *in the conference of the centennial two clearly related contradictions have emerged regarding museums. (...) Nevertheless, after one century of intended devotion to the ideals of public service, we know that nine in ten museums are not in the service of the public at all, they only serve a better educated middle class, and that holds no interest in the groups of a lower social and economic levels in present day conditions. The important thing is not that the ideals of public service are wrong, only that evidently they are not being fulfilled. (...) What “public service” really means in the 1990’s is the service to visitors, most of whom are tourists. The concept of the public is, therefore, in practice, the concept of service*

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*to tourism. (...) Another mistake is that museums and the galleries have a lot to teach and little to learn from the management practices from the business world, and that the attempts to apply commercial management methods can be disastrous for the museums. As a consultant with many years of experience in museums, I have to say that I could never prove that there was such confidence in the management capacity in museums in general. (...) The great service providing companies, as for instance banks, are in contact with all kinds of publics with distinct degrees of affluence. To offer quality products, a good quality-price ratio and a totally new philosophy in order to attract and serve clients are trumps in the hands of successful enterprises, and they are not cases in which the market is limited to a great degree, as is the case of museums to the middle classes. (...) The term "product" is still taboo to many museums (...) The museums will not have any other option but to apply a more professional management in order to survive and remain "open to the public" due to the more objective conditions that are to emerge in the coming decade (...) in my opinion, in the next 20 years or less, the ideals of public service will be defined again aiming to reflect the information on management and present day reality.*

The first step towards change is to switch from a descriptive self-centred attitude to a critical/interpretative stance, adequate to an organisation that observes itself and knows how to listen. Quality aims planning, involving all of the organisation, partners and clients, in a self-evaluation process grounded on evidence, processes and procedures. This conception induces a new organisational culture, as it from the start displaces power from the producer's sphere towards the sphere of the citizen/client, a fact that, in the concrete case of the museum's organisation, may signify a profound change in the concepts of leadership and strategic planning. These changes generate natural

resistances and are carried out through slow and not always pacific processes, and can only turn out a good result with the total commitments of the top level management and the receptivity of all the people within the organisation to the multiple learnings that result from the self-evaluation and the inherent collective responsibility.

In this respect, Duarte Gomes, PhD Professor in Work and organisations Psychology, in his book “Organisational Culture, Communication and Identity” [*Cultura organizacional, comunicação e identidade*, Coimbra 2000], states that *organisations are a cultural phenomenon and contemporary culture is an organisational culture, then (...) organisation is the “paradigm” of present day culture and the “cultural paradigm” is the organisations’ new paradigm.*

*This paradigm is characterised by, from the start, the adoption of a symbolic conception of organisation and culture. Culture is something symbolic that identifies the organisation and is not something concrete that it owns. It is through social interaction, and, therefore, of communication, that it is formed. As a communication process that is interactively maintained, the organisation presupposes a constant interpretative activity. On it is dependent its construction (social construction) and maintenance. In other words, the organisation is a culture. (...)To say that a organisation features culture or that an organisation is a culture corresponds to the formulation of two distinct perspectives on organisational culture. In the first case (the organisation features a culture), culture is one of the many intervening factors in the organisation’s workings. From the point of view of management, culture is a subsystem internal to the global system that is the organisation, which, as with other systems such as the technological or the financial, must be managed so as to ease the evolution of the afore mentioned system and of its goals of internal and external*

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*adaptation. (...) In the second case (organisation is a culture), the symbolic (communicative) nature of organisational life is highlighted. (...) The organisation is conceived as a system of knowledges that can be accessed by the organisational actors to interpret the reality in which they live and that they cause to live. It is a system that allows them to communicate and that communicates personal experience and the constituted collective knowledge (Morin, 1984). The organisation as culture is a construction and a fact or an exteriority, whether described in cognitive terms (common knowledges used by the organisation's members) to perceive, classify and analyse the surroundings, or in symbolic terms (processes through which the individuals share a common meaning of reality). When we say that the organisation is a culture, the stress rests on the way as the organisation is built, the manner in which it represents and expresses itself, as it presents itself, how it organises itself. It is not the case of denying or underestimate the importance of the traditionally considered variables (technology etc.) but of considering the way in which these are conceived and lived by the members of the organization. To see the organisation as a culture is to see it in its living and symbolic aspects.*

The way in which museums express and represent themselves highlights indeed the evaluation that they make of themselves and their expectations in the face of partners. As with people, organisations are not only *what* they advertise but also what they look like and fundamentally what they add of prospective. The credibility of discourse results in the adaptation between form and content. It does not suffice to state that we are receptive to dialogue and open to the community if we remain atop of a platform of superiority and/or paternalism and if we despise the contributions of other areas of knowledge.

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We are sure today the multimode and permanent evaluation of museums and its services reinforces organisational identity, imprinting on them indispensable security so that they unpretentiously and efficaciously relate to partners/clients. But, in order for that to take place, we have to unequivocally define the mission of the museum or of its services, we have to assimilate and transmit the organisation's values and permanently review the vision. The plural taking up of this task, when we refer to the organisation and management of quality, is not a matter of discourse style, for, quoting Ramos Pires in "The quality, quality management systems", Lisbon 2000, *quality emerging as an enterprise's raison d'être is not someone's role inside the enterprise, but it pertains to all of its people. On the one hand, this is so because many people and functions inside the enterprise can affect the quality of the final product, but on the other hand, it is because the form with which the consumer understands quality is influenced by many factors. The enterprise itself can be seen as a group of departments providing services to one another. So if its so, the service can be specified, evaluated and controlled. (...) the quality management system will come to constitute the essential basis of the relationship norms system, as it defines by name the policy and the goals, the responsibilities, the communication channels and the follow-up actions. The institutionalisation of a total quality value system implies in the significant change in the working mechanisms for problem solving, privileging the pluri-disciplinary group work and interpersonal relationships.*

Quality management responds to many of these questions through the application of concrete instruments for evaluation, measuring and control of results.

This conclusion results from the presentation of a practical case of the application of one of these instruments – the CAF

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(Common Assessment Framework) , to a museum educational service; concretely, the Setúbal Municipal Museums Educational Service, within the scope of the candidacy to the Quality Services Award/ AMDS – 2003.

These services were, as far as we know, pioneering in Portugal in the adoption of the self-evaluation instrument on museum level. The experience is described in the candidacy document and the evaluation result is contained in a report elaborated by external auditors. The services in question have been distinguished by their impact on the community, within the scope of the award, but what is more important is that the candidacy has made people in the organisation aware of the present day quality management issues and has provided important learning that they now propose to share with other museums' services. The evaluation and continuous improvement processes are long and, as the name indicates, are never finished. The experience of the educational services studied here is an example of that, for, at the end of many months of reflection and production of documents, they did not conclude the pilot/diagnosis phase inherent to the beginning of the process.

If, for museums and other organisations of cultural and artistic nature, the quality management instruments are new, other public services and enterprises in Portugal already make use of them and have applied, over the years, with reflexes in services improvement and in the commitment with partners/clients, expressed in procedure and in good practice manuals. Today is common to use services such as banks, telecommunications or IT, among others, which depend on the privileged relationship with citizen/clients, where the answer to the following questions is patent and explicit: who are we? What do we do? What are our values (what do we believe in)? What are our population and our citizens/clients? What is our vision (where do we

intend to go to)? Who are our partners? Whom do we serve? What is our mission? What is our global knowledge? What do we specialise in (what unique products do we offer)? What do we investigate? What we seek to innovate?

Clearly it is not by chance or just a matter of style that they have made such choice, but instead it is because they have understood that their survival depended on the clarity of the principles with which they present themselves and on the specificity of their knowledge. As an example, we have recently had access to an advertising document of a well-known opinion statistics, analysis and studies enterprise, GfK (it has assimilated part of the Portuguese Métris) that synthetically and unequivocally states: ***GfK. Growth from knowledge.***

To return to the museums, under the light of quality management, this knowledge is not centred only on scientific competences in the fields of History, Archaeology, Art and other areas inherent to the museum's vocation and to the nature of its collections, but it is equally centred on the knowledge of the organisation's personnel and partners in interaction.

A diffusion document issued by the Ministers Council Presidency/Administrative Modernisation Secretariat, titled "Quality key-ideas", defines the concept of quality: *quality is identified with the satisfaction of clients' needs, explicit or implicit; under this concept one finds the reliability of the product provided, the meeting of delivery deadlines, the defence and protection of the client. In the area of services the concept is based fundamentally in the facilitation of the client's life and includes, furthermore, promptness in execution, adherence to norms, correct and reliable information, personalised customer service, immediate attention to complaints.*

The same document adds:

- *All quality is measurable; so the elaboration of measuring instruments must be carried out, as well as its periodical use;*
- *All quality can be improved; in order to fulfil this goal, the organisation's effort at all levels is essential;*
- *Any quality improvement programme is carried out only if driven by the top director; this idea implicates in a change in the concepts current in most public administration: authoritarianism, centralisation, overvaluing of rules and regulations; distancing from clients and their needs;*
- *All who work in the organisation can contribute to quality improvement; quality improvement is obtained by means of continuous, guided and coordinated efforts, and is encouraged by the permanent verification of the progresses achieved;*
- *The development of quality improvement programmes features a methodology of its own; it is indispensable to elaborate a methodology. Otherwise, one runs the risk of not obtaining the desired results and of discrediting any form of quality improvement in the provided services programme;*
- *The launch of a quality improvement programme can spark conflicts; in the case of the public administration these conflicts are tendentially more numerous and of greater intensity, so leaders must be prepared for a creative conflict management;*
- *There are total possibilities of achieving modern public services;*
- *The quality management subsystems don't necessarily have to be complex; the fundamental issue in this case is adaptation, that is, its capacity in helping to ably and expeditiously solve problems; in such a way, non-quality problems can be overcome by means of what each*

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*service can provide, of its “products”, a quality guarantee to its clients.*

*As total quality goals, the author defines: Zero late arriving; Zero omissions; Zero mistakes; Zero unnecessary papers; Zero misunderstandings. Naturally, not all these goals can be met, they represent an ideal, but fulfilment rates are established for each zero, whose periodical exam gives an immediate idea of how quality is faring in our organism.*

The pilot version for the CAF (Common Assessment Framework) was presented in May 2000, during the 1<sup>st</sup> European Union public administrations quality conference, which took place in Lisbon.

The last version of this common evaluation structure was presented at the 2<sup>nd</sup> European Union public administrations quality conference, which took place in Copenhagen in October 2002.

CAF consists of a tool that was built to help European Union public administrations to make use of management techniques of quality management so as to improve their respective performance. It is a simple tool of easy use, allowing for the self-evaluation of public organisations (the Portuguese version was translated and published by the Public Administration General Direction).

CAF is a simplification of the EFQM (European Foundation for Quality Management), used as a model for the organisations' total quality self-evaluation. Total quality, in ideal terms, aims excellence.

The concept of quality, according to the definition adopted by the ISO (International Organization for Standardization), is a group of the properties and characteristics of an organisation that enable it to satisfy needs, implicit and explicit. The organisation is understood as

a product, a piece of property / *good* or product / *service*, reporting the needs to the internal and external clients.

CAF holds the advantage of being a reliable and versatile tool, compatible with European systems, which the organisations can use freely, with no costs regarding rights as it is in the public domain.

In CAF's view, all quality is measurable and can be increased, through the critical reflection and involvement of all people in the organisation. It values learning by mistake. It favours change and innovation. It promotes the creative management of conflicts. It allows for the system's permanent monitoring and for the control of processes and results.

CAF's strategy is organised in nine criteria, the five first ones regard the means and the last four regard results:

- Leadership;
- Personnel management;
- Planning and strategy;
- Partnerships and resources;
- Processes and change management;
- Results related to people;
- Results geared towards citizens/clients;
- Impact on society;
- Key-performances results.

The nine criteria identify the main aspects of organisational analysis, and further unfold into 27 sub-criteria that contribute to an even finer analysis, promoting a minute self-observation of the organisation.

The people in the organisation are involved in a critical dynamics of self-knowledge, on the basis of this tool and supported by

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the precious indications furnished by this self-evaluation methodology, fill-in form and information record, described in a synthesis document that serves as a base to external audit. This document contains the characterisation of the organisation, the presentation of the team, the organisation's mission, the description of procedures and key-processes, flowcharts of the various processes identified by the people in the organisation, the answer to all the criteria and sub-criteria, as well as an evidence dossier (documental proof and others, duly ordered and of easy consultation by the team and auditors), a classification table for all the criteria observed in a numeric scale from zero to five, based on the levels of planning, implementation and verification of the various initiatives and results progress. In the end, all information contained in the document and the quantitative matrix of self-evaluation constitute a self-portrait of the organisation, from the perspective of the people, which is confronted with that of the external auditors, according to verification/confrontation lists. From this observation and evaluation emerges an average that confirms the validity and rigour of the self-evaluation carried out by the people in the team, and also a group of reports resulting from the progression of the effective and expected (expectations) improvement, added with recommendations for its continuation, by means of corrective actions to be implemented by the organisations or services.

In our case, this prospecting phase grounded on the CAF has taken around four months and was followed by a quality consultant (paid by the organisation promoting the award, the AMDS), who supported the people in the team in the decodification of the document's terms and in the adaptation of the tool to the object of study, that is, the Setúbal Municipal Museums Educational Services.

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As one can imagine, the implementation of a quality process and the continuous improvement of an organisation or service can involve significant financial means. Consultancies and audits are onerous as the organisation or service itself has to tool up with the adequate means of observation, record and treatment of information, implicating in investments that, in the last instance, reverts to the organisation. However, despite the known and worrying difficulties of financial nature faced by national museological institutions, we think that this should not constitute, at the beginning, a hindrance, for it is something that may not yet be urgent (because it is not yet part of the immediate concerns of the Portuguese museums and museological services), but it is, in fact, a priority. The issue here is that of knowing what are the real costs of non-quality and how we can seek the means to overcome them, establishing phases and securing the commitment of the whole the organisation, of the population, public powers and privileged partners, in a desired transformation process grounded on mutual help and on learning about the other and ourselves, accepting that we are not the only organisation that suffers constraints and that we can learn with and teach those who are close to us (other Portuguese and foreign museums), or with others with radically different missions. If we hold a common language (provided by quality management) and the firm determination of communicating/changing we shall achieve the minimisation of the greatest of constraints that is fear, masked as the attitude of “proudly alone”, that soothes the feelings of the misunderstood in all eras and of all social conditions.

Again quoting Ramos Pires in “Quality, systems for quality management”, 2<sup>nd</sup> edition, April 2000, (...) quality is not under discussion anymore, as without it the organisation does not survive (perhaps the perception that quality is not important spring from such

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fact); quality is unquestionable (perhaps the decisions that costs do not matter in its achieving spring from such fact). (...) It's not a matter of convincing anymore, management philosophy, but of action. The organisations need to introduce not a miraculous technique, but more techniques and methods, according to the complexity of the problems and the competitiveness levels of the markets. However, it must be remembered that the people and the organisations need time to learn, though the learning conditions allow this to be a speedier process.

This is also referred to by Paulo Alves Machado, in a long interview recorded by us on the 13<sup>th</sup> of February 2004, based on his personal experience as a literature and linguistics teacher and consultant to the candidacy for the AMDS/quality award, put forward in 2003 by the Setúbal Municipal Museums Educational Services. At a certain point in the interview, he refers to the process called "metacognition" and the interaction in learning that the CAF model for quality and self-evaluation processes provides. Indeed, in our case (Setúbal Municipal Museums Educational Services), we could highlight various episodes that resulted in recognisably valid learning in people's performance, above all at the level of the communication and mutual respect that results from the awareness of each one's knowledge and their importance to the key-performance of the organisation and its mission.

According to the document published and publicised by the Public Administration General Direction, issued in February 2003, the CAF model is a tool that offers to the organisation the opportunity to learn to know itself through the following dimensions and approaches to the organisation:

- Evaluation based on evidence;
- Decision making by part of the direction and a consensus about what has to be done to improve the organisation;
- The evaluation by means of a series of criteria accepted by European countries;
- Measuring of the progress of an organisation by means of periodic self-evaluations;
- The link between aims and strategies;
- Focus on the improvement activities where they are most needed;
- The promotion and sharing of good practices between different departments of an organisation and between organisations;
- The motivation of people in the organisation by means of their involvement in the improvement process;
- The identification of progresses and the improvement levels achieved;
- The integration of a group of quality management initiatives into work procedures.