DECISION MAKING GUIDE FOR
DIGITAL TECHNOLOGY PROPOSALS IN MUSEUMS

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the
transformative
museum

SERVING SOCIETY THROUGH THE
MUSEOGRAPHIC LANGUAGE

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Presentation

Throughout the COVID-19 pandemic, we have been able to attend multiple online seminars in which the need to advance the digital technology proposals of museums has been advocated. This being true, we have not observed the same interest in offering instruments that help in specifying how to do it. But what is more serious, we have not attended any event where the need to think strategically and not purely executively was raised.

Given this and as part of our mission, at *The Transformative Museum* we have designed a tool that facilitates decision-making in this regard. That is, moving from exclusively executive action to strategically thought-out management. To achieve this, we have had the generous collaboration from colleagues who adhered to our manifesto such as Eloísa Pérez, Albert Díaz, Óscar Menéndez or Artur Moreno, as well as others who have generously contributed their vision such as Susana Funes or Nacho Granero.

The guide consists of three parts. The first highlights the three essential strategic questions that every museum should ask itself before undertaking any initiative. The second consists of an evaluation rubric to analyze the museum value of the proposal and its needs in terms of executive management. Finally, the third part is a situation map where, based on the previous rubric, each proposal will be located to visualize its relevance.

Our desire is to be able to help museums in their daily management and to do so we have set ourselves three specific objectives with this proposal:

1. Help in strategic decision making with an easy-to-apply instrument.
2. Guarantee a transversal reflection process that involves all departments.
3. Strengthen the institutional vision of the proposals.

It is obvious that the analysis of any innovation proposal in a museum can be carried out with multiple tools, the one we propose being just one of them. At a strategic level, the Canvas model can be an excellent tool to analyze the real needs of the institution and our audiences. Focus-groups, workshops, communities of practice, are other various instruments that can help us. We encourage museums to consider its strategic use on a regular basis.

As a dynamic tool, we do not consider it finished. It is through its analysis and use that it will be subject to additions or changes for its improvement. In this sense, we will thank you for any suggestions you send us through our email address: info@elmuseotransformador.org.

We are waiting for your ideas!

1. Strategy.

We start from the idea that the contemporary museum is an institution that has changed from being an end in itself to a means of communication. A medium that uses the museographic language to communicate stories based on the heritage it preserves and protects, with an obvious educational purpose and to promote social transformation. The current museum does not exhibit objects but communicates facts, events, evidence, natural or human expressions, that is, manifestations perceptible by people and that directly challenge them.

Museums communicate these manifestations through narratives of various kinds that should be their leitmotiv. The museographic language uses two types of assets that are characterized by their tangibility: objects and phenomena that can be displayed as authentic or represented.

The power of these resources is their tangibility. The surprise, the emotion, the emotional bond they produce, the conversations they generate are unique and this must be considered when we talk about digital initiatives. The question "Is it real?" will never be generated in front of a screen that only shows an image, a representation. We should not try to transfer the tangible to what is represented. Digital technology projects require specific digital content and planning.

Taking these premises into account, the digitization of the museum must be a strategic process, not a circumstantial one. Thus, the guide proposes a work process that begins with some key questions that should be answered for any innovation that the museum wants to implement, whether digital or not. Unfortunately, many of the actions undertaken in museums respond more to the need to demonstrate that things are done, than to a defined strategic vision.

Thus, the questions to ask before undertaking any new digital proposal should be those in the following figure:
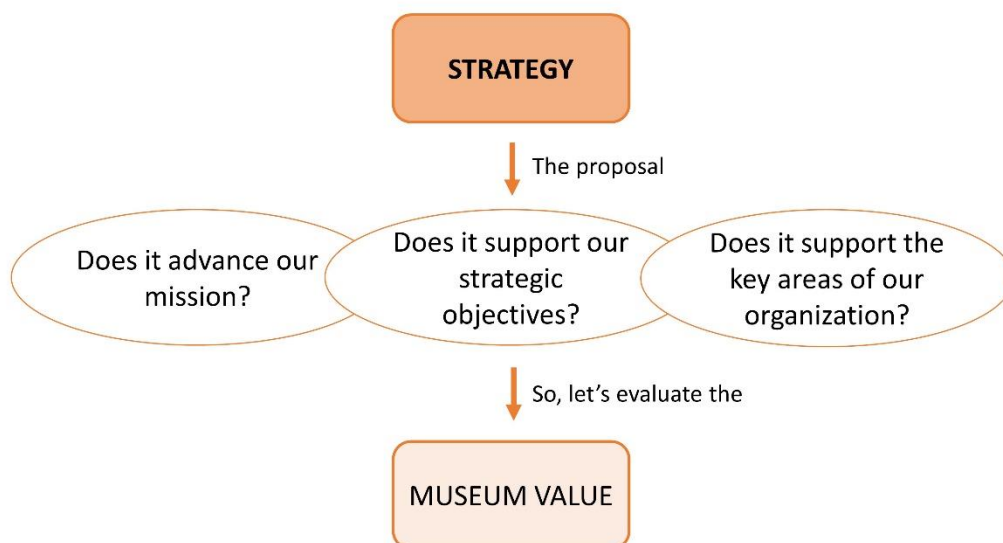
The reasoned answer to these three questions should be positive to continue with the evaluation process. A negative response to any of them should lead to a rethinking of the initiative or of our strategic management, if applicable.

2. Evaluation rubric

The rubric consists of a series of indicators for which three possible levels of performance have been developed: inappropriate, satisfactory, or outstanding. Each level of performance is described with a paragraph that is intended to facilitate a precise answer. A score has been established for each performance level (-1, 0 or +1) that must be assigned to each indicator. The sum of the scores of all the indicators will give us a numerical value that will help us in the decision to make or in rethinking the area corresponding to the indicator. It consists of two parts: museum value and executive management.

Museum value

In the first part, the museum value of the proposal is evaluated as a tactical realization of the strategic objectives. We understand museum values as all those that refer to their educational or informative potential, to a direct link to the museum's own contents, whether exhibitions, collections, research, etc., to the precise definition of a target audience and to the promotion of a social experience and active involvement of the participant.

Executive management

Once the museum value of the proposal has been assessed, it is time to see if its management can be carried out with the available or assigned resources, for which we have proposed the second part. In this section of the rubric, we assess whether the necessary financial and human resources are adequate, if the technological resources it will require are sound, what materials and specific physical spaces it will require and the formative evaluation mechanisms with which we will equip ourselves to adapt its development.

Important note

In a rubric of this type, it is impossible to reflect every one of the various aspects that a specific museum must consider. Thus, the rubric is offered as a tool for use as it stands but it can also work as a consideration of the most important aspects as a starting point for a wider reflection.

There are many other characteristics that a digital proposal must consider. One of them is the digital divide. Although this aspect is not the direct responsibility of the museum, it must be considered when designing the proposal to try to minimize it as much as possible. Likewise, although the rubric mentions inclusion or the need to link the initiative with current social or environmental problems, it is worth insisting on the need to consider, in its design and development, the perspective of gender or sustainability, for example.

Indicator	Performance level			Score
	Inadequate	**Satisfactory**	**Outstanding**	
Value	**-1**	**0**	**+1**	
Museum value				
Link to the educational function of the museum	The proposal does not offer any educational value since it does not generate any intellectual transformation in the user, be it emotional, aesthetic or in learning.	The proposal contains some educational value since it promotes active engagement that leads to emotional, aesthetic or learning changes that are part of the objectives of the museum's educational project.	The proposal has a high educational value since active engagement is designed to achieve transformation based on universal emotions and combining experience, aesthetic enjoyment and learning, in full alignment with the objectives of the museum's educational project.	
Promoting active involvement and socialization	The proposal is designed for the passive enjoyment of an isolated individual without the possibility of sharing it with other people.	The activity, although directed, allows a certain degree of freedom for individual or collective participation and connects with the social context of the museum. However, it does not promote the generation of questions and solutions nor the sharing of results.	The proposal has been designed with the intention of promoting and facilitating the generation of questions and solutions to current social issues in a collaborative way, as well as the sharing of results in a process of co-creation that enriches it.	
Link to museum content	The proposal could be promoted by an institution outside the museum since it has no link with the museum's own contents (exhibitions, collections, research, etc.).	The proposal can only be developed by the museum since it is directly linked to its contents (exhibitions, collections, research, etc.), although this is not made explicit in its design.	The proposal could not be carried out by any other institution since it is clearly linked to the contents of the museum (exhibitions, collections, research, etc.) and this is explicitly shown in its design.	
Link to the museum experience	The proposal does not include any link between the virtual and the in-person experience nor does it refer to its assets. Moreover, it does not provide any added value because it does not offer new readings or narratives that would boost the transformative nature of the museum.	The proposal complements and develops the on-site visit to the museum or adds value to it by offering new readings or narratives that can boost its transformative character. It allows for the visitor's autonomous management of the experience.	The proposal systematically refers to the unique assets of the in-person visit and gives it a high added value as it offers new readings or narratives that boost the transformative character of the museum and the autonomous management of the experience.	
Target audience	The proposal is aimed at an undefined audience. The characteristics, motivations and differential interests of the public have not been considered.	The proposal is aimed at a specific audience, but the museum's interest in it has not been established, nor have its characteristics, motivations and interests been clearly defined.	The activity has been planned for a specific, well-defined audience of interest to the museum, whose characteristics, motivations and interests have been taken into account in its design.	
Accessibility and inclusion	The proposal is not accessible perceptually, cognitively or socially. The activity is exclusive because it does not include the participation of disadvantaged groups. Its design does not consider accessibility and inclusion as essential aspects.	The proposal has some perceptual, cognitive or social accessibility problems. It considers the participation of disadvantaged groups but does not favor their full inclusion.	The proposal is fully accessible perceptually, cognitively and socially. It is inclusive by considering the participation of disadvantaged groups. The design considers accessibility and inclusion as key elements.	
Improving services	The initiative does not take into account the improvement of any specific museum service (programming, collection management, communication, education, etc.).	The initiative identifies some museum services that will benefit from its implementation (programming, collection management communication, education, etc.) but does not specify improvement objectives.	The initiative identifies the services that will be improved by its implementation (programming, collection management, communication, education, etc.) and defines specific improvement objectives.	
			Total	

Indicator	Performance level			Score
	Inadequate	**Satisfactory**	**Outstanding**	
Value	**-1**	**0**	**+1**	
Executive management				
Financial resources	The proposal requires the use of a large amount of financial resources, which are not foreseen in the strategic plan or the annual budget and which must be taken from other essential activities of the museum.	The proposal requires the use of financial resources but these can be taken from other activities that are not essential to the operation of the museum. However, this implies a deviation from the strategic plan or the annual budget.	The proposal does not require the availability of unforeseen financial resources, or its funding is contemplated in the museum's strategic plan and annual budget and is not detrimental to any other activity.	
Human Resources	The proposal cannot be implemented without new hires as the current staff is already at capacity with essential duties and there is no possibility of new hires.	The proposal only requires the use of personnel that is performing other non-essential functions that can carried out by other staff members. However, it is not fully aligned with the museum's strategic plan.	The development of the proposal can be carried out with the current staff or by new hires that are already planned, without compromising other essential functions of the museum.	
Material and space requirements	The proposal cannot be developed without the unforeseen use of material resources or spaces that must be taken away from other activities that are essential for the operation of the museum.	The proposal requires the use of material resources or spaces that can be diverted from other activities without a significant negative impact. However, the strategic plan will have to be reviewed.	The material resources or spaces necessary for the proposal are contemplated in the museum's strategic plan and do not imply any detriment to the rest of the activities of the museum.	
Technological resources	The proposal requires unavailable technological resources and their acquisition was not foreseen in the short or medium term. There is no assessment of their conservation, adaptability to changes or obsolescence.	The proposal requires technological resources that are not available, but their acquisition is foreseen in the medium term. The proposal includes an assessment of their conservation, adaptability to changes or obsolescence.	The proposal requires technological resources that already are, or will shortly be, available, or are easily affordable in the short term. There is a detailed assessment of their conservation, adaptation to changes or obsolescence.	
Evaluation	No prior evaluation has been planned to help formulate objectives, nor has formative or summative evaluation been designed. The impact of the proposal is not evaluated, or it is only evaluated based on quantitative elements such as the number of visits, satisfaction, downloads or similar.	No prior evaluation is foreseen but some kind of merely summative evaluation is planned. The real impact of the proposal is measured through an *ad hoc* quantitative and qualitative evaluation plan, mainly with digital methodologies and tools that do not include personal contact. There are no plans to use results to improve similar programs in the future.	A prior evaluation has been planned to set objectives that are adapted to the audience with formative and summative elements. Impact is assessed by means of a quantitative and, above all, a qualitative evaluation plan, combining digital tools and personal contact with real users in sufficiently representative numbers. Conclusions are drawn to inform similar future programs.	
Participatory design	The proposal will be developed by a single department or by a member of that department who is interested in the subject. It is known only to the members of the department that designed it. The management is not on board.	The proposal will be developed within a specific department but considering some input from other departments. The entire museum has been informed of its development. The management is aware.	The proposal will be developed through a participatory process involving all the departments and players, as well as representative stakeholders from outside the museum. The entire museum is kept in the loop through an effective communication plan. The management is involved. and strategic management bodies are involved.	
			Total	

3. Situation map

Each of the indicators has received a score of -1, 0 or +1, depending on the response. The total score of each section is now plotted on the following graph according to its corresponding axis: Horizontally for the museum value and vertically for the executive management value. In this way, the proposal will fall into one of the four quadrants. The proposals in the upper right quadrant will be the most suitable and those in the lower left will be inadequate. However, the final decision must be made by the evaluation team performing the analysis. The most important part of the whole process is the reflection on the different indicators.

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