

# Annex I

## UNIFORM QUALITY LEVELS FOR MUSEUMS

In implementation of Article 114 of the Cultural Heritage and Landscape Code, Legislative Decree no. 42 of 22 January 2004, as amended, and which is valid for museums, and monuments, and archaeological sites, the uniform quality levels set out here were jointly developed by the Ministry, the Regional Governments, and the local authorities with the contribution of university teachers, public officials, and experts in the field of museums and the management and enhancement of cultural heritage.

Development of this document began from Cultural Heritage and Activities Ministerial Decree dated 10 May 2001, setting out “Guidelines on technical-scientific criteria and operating standards of museums”, which divided the management, conservation, and enhancement of the museums into eight areas and took into account the work and the concluding proposals of the Ministerial Committee for Defining the Minimum Quality Levels for Enhancement, set up on 1 December 2006 and chaired by Massimo Montella, which identified a number of minimum requirements for each area. It has also taken into consideration the experiences of many of the regional governments in Italy of according recognition or accreditation to non-State museums on the basis of the “Guidelines” mentioned.

In relation to museum standards this document also takes particular account of the *Code of Ethics for Museums* of the *International Council of Museums* (ICOM) and the *UNESCO Recommendation concerning the Protection and Promotion of Museums and Collections* dated 17 November 2015; in relation to the regulation of state-owned places of culture and institutions, it takes particular account of Cultural Heritage and Activities Ministerial Decree dated 23 December 2014, on “The Organisation and Functioning of State-owned Museums”; in relation to vigilance and security, it takes particular account of Cultural Heritage and Activities Ministerial Decree dated 30 June 2016 on “Criteria for Vigilance, Safety, and Opening to the Public the State-Owned Museums and Places of Culture”; finally, with reference to the specific characteristics of the archaeological sites, it takes particular account of the “Guidelines for the Constitution and Enhancement of Archaeological Parks”, developed by the joint working group instituted by Cultural Heritage and Activities Ministerial Decree dated 18 May 2010 and adopted by Cultural Heritage and Activities Ministerial Decree dated 18 April 2012.

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As the final outcome of the work of the Committee for Putting into Effect the National Museum System (2015-2017), and inspired by best international practice, this document identifies three relevant macro-areas:

**I Organisation**

**II Collections**

**III Communications and relations with the region**

In turn, it breaks down these three macro-areas into different sections and items that reflect the organisation and activities of museums, as a matrix for verifying that minimum standards are being met and for identifying objectives for improvement .



# ORGANISATION

## 1. Legal status

In accordance with the general definition of a museum as established by ICOM and consistently with Cultural Heritage and Activities Ministerial Decree dated 23 December 2014, the statute or regulations for a museum should clearly identify:

- The nature of the museum as a permanent not-for-profit organism;
- Its mission and objectives;
- Its forms of government and management;
- Its financial structure and accounting system;
- Its personnel regulations;
- Its facilities and security regulations;
- Its collections;
- The general principles for managing and curating its collections;
- Its general principles for providing services to the public;
- Its methods for collecting data about the activities and management of the museum, for statistical and programming purposes;
- The tasks and functions it intends to carry out in relation to its geographical context and, if applicable, as part of any associative type of organisation.

MINIMUM STANDARDS	OBJECTIVES FOR IMPROVEMENT
<ul style="list-style-type: none"><li>- A statute is/ regulations are in place clearly indicating at least the following:</li><li>- The name of the institution</li><li>- Its business address</li><li>- Its legal status</li><li>- Its mission</li><li>- Its collections</li><li>- Its functions and tasks</li><li>- Its organisational structure</li><li>- Its financial structure</li></ul>	

## 2. Accounting and finance

The financial resources of museums must be managed in compliance with current laws and regulations and the accounting rules that derive from these. Art. 3 of Cultural Heritage and Activities Ministerial Decree dated 23 December 2014 refers to the budget of a museum as the “accounting document that places in evidence how the financial and accounting management of the economic resources available to the museum have been planned, and the outcomes. It should be prepared in accordance with principles of publicity and transparency, identifying each individual item of revenue and expenditure for the purpose (inter alia), of enabling an assessment to be made of the adequacy of the economic structure, that it is being correctly managed, and for comparison with other museums, including internationally”.

The financial structure of a museum correlates with its organisational and management aspects and the context in which it operates. The economic resources of museums must be adequate for their size and characteristics, and must ensure that the minimum standards established for the premises, personnel, security, management, care of the collections, and services for the public are respected.

However it would not be possible to develop a model budget, correctly set out with predefined chapters and dimensions, that would be suitable for use in all museums as a concrete rather than a theoretical point of reference.

For example only some state-owned museums have scientific, functional, accounting, and organisational autonomy. In such cases the Decree of 23 December 2014, mentioned previously, establishes that the budget must be “prepared and approved in accordance with the provisions applying to administrative and accounting operation and the rules governing cash service as per Presidential Decree no. 240 of 29 May 2003 and supplemented by Presidential Decree no. 97 of 27 February 2003”.

Most public museums do not have their own budgets. This does not mean that they should not provide themselves with accounting documents setting out - in their entirety - their expenditures and revenues (as provided for by the previously mentioned Decree no. 23 of December 2014).

Thus, including in the case of these museums, the continuous control and monitoring of expenditures and revenue makes it possible to verify that their balance sheets align with their objectives and programmes. Their accounting documents must clearly set out expenditures and revenues, using common methods for classifying and describing each item.

So far as revenues are concerned, as a minimum the following must be identifiable:

- from self-financing;
- from external resources: transfers, contributions, sponsorisations, endowment fund.

So far as expenditures are concerned, as a minimum the following must be identifiable:

- for normal operation;
- for the management and care of the premises;
- for the management and care of the collections;

- for services for the public and cultural activities;
- for investment and development.

MINIMUM STANDARDS	OBJECTIVES FOR IMPROVEMENT
<ul style="list-style-type: none"> <li>- Economic and financial documentation is in place setting out income items (divided into self-financing and external resources) and items of expenditure (distinguishing expenditure for ordinary administration and personnel costs from expenditure for management and care of the museum and collections, services to the public, cultural activities, investment, and development).</li> </ul>	<ul style="list-style-type: none"> <li>- Adopt social reporting methods for the activities of the museum such as annual reports, social budget, impact analyses</li> <li>- Adopt financing strategies for managing and enhancing the museum and its collections (agreements with financiers, crowdfunding, etc.)</li> </ul>

### 3. Premises

This area covers access to museum buildings including disabled access, the organisation and use of the internal spaces, and security.

So far as premises are concerned and taking into account the derogations permitted for museums in historic buildings, the general preconditions for this area are that any premises to be used by the public must comply with current regulations on structural stability, building services, water and plumbing, overcoming architectural barriers, and the safety of life and property.

To ensure that the premises are open to a wide public and can be used by everyone, special importance has been attributed to disabled access, primarily for persons with motor, sensory or cognitive disabilities. The absence of architectural barriers, as provided for by law, is considered a minimum requirement and this also applies to the recognition/accreditation documents for local museums issued by Regional Governments if other parameters are also obligatory such as: the definition of the use class of the museum spaces; the act under which the person responsible for safety is appointed; compliance with regulations on the maintenance and safety of the premises (internally and externally) and of the building services, equipment, and installations.

To improve accessibility and so that the collections of the museum can be enjoyed by as wide a public as possible, there are many examples where access has been ensured by virtual visits that can be used either at the museum itself or remotely, using digital

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technologies which enable any parts of the spaces and collections that cannot be accessed physically.

Other relevant dispositions in this area derive from Legislative Decree no. 81/2008, "Consolidated text on safety in the workplace", which also applies to museums as places of work, and Cultural Heritage and Activities Ministerial Decree dated 30 June 2016, "Criteria for opening state-owned museums and cultural sites to the public, including surveillance and security".

As well as carrying out structural works to overcome architectural barriers, it is likely that specific reception protocols for the disabled, which currently can only be considered as a quality objective, will gradually become obligatory. This will enable those responsible for reception to address the specific requirements of these visitors, thereby considerably improving the service.

So far as the organisation of the internal spaces is concerned, this document considers as the most important spaces those which ensure that the primary functions and activities of a museum can be carried out. Additionally, some services associated with the cultural and scientific nature of museums have been considered for analysis such as archives, libraries, and workshops, or have been more appropriately framed as supplementary services, such as bookshops, cafes, and cloakrooms.

Security is understood as referring to premises, assets, and people (the staff and the public). To all intents and purposes minimum safety standards are already applied homogeneously because they derive from national regulatory frameworks, including some that refer specifically to museums (see, e.g. Cultural Heritage and Activities Ministerial Decree no. 569 of 20 May 1992 on museums and galleries in historic buildings).

It is to be hoped that in addition to caring for people, care for the integrity of the artefacts should be reflected in every museum's safety and emergency plan and in its practices for the conservation of its collections and the planned maintenance of its building services.

The prospect of qualitative improvements to buildings, in the form of features and services that augment the functional effectiveness of the museum and the visitor experience, should include the creation of spaces that can be used for temporary exhibitions and that should be accompanied by facilities reports describing their physical and environmental conditions, to ensure that artefacts are adequately protected during temporary exhibition periods.

In this regard see the "Premises" section of the ICOM Code of Ethics for Museums.

### 3.1. Uses of the spaces

MINIMUM STANDARDS	OBJECTIVES FOR IMPROVEMENT
<p>7</p> <ul style="list-style-type: none"> <li>- The exhibition spaces in museums and other places of culture must be appropriate and to the correct standards so that they fulfil their functions of:               <ul style="list-style-type: none"> <li>- conservation (in the case of museums)</li> <li>- permanent exhibition (in the case of museums)</li> <li>- reception/information/ticketing</li> <li>- services that are inclusive for the disabled</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>- A museum should have the following spaces and public services:               <ul style="list-style-type: none"> <li>- temporary exhibitions</li> <li>- staff offices</li> <li>- staff offices</li> <li>- archive *</li> <li>- library *</li> <li>- photographic library*</li> <li>- teaching spaces</li> <li>- photographic workshop</li> <li>- restoration workshop</li> <li>- other workshops</li> <li>- study room/s</li> <li>- lecture/projection room</li> <li>- ticket office</li> <li>- furnished public rest areas</li> <li>- cafe/restaurant spaces</li> <li>- drinking water points (for archaeological sites)</li> <li>- cloakroom/personal storage</li> <li>- bookshop</li> <li>- external spaces</li> <li>- services/spaces for adults with children (e.g. baby changer, feeding spaces, bottle warmer, strollers)</li> <li>- Wi-Fi</li> <li>- spaces that are suitable for community initiatives</li> <li>- nearby parking (with disabled spaces)</li> </ul> </li> </ul> <p>* with controlled access for particular types of user</p>

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### 3.2. Comfort in exhibition spaces

MINIMUM STANDARDS	OBJECTIVES FOR IMPROVEMENT
<ul style="list-style-type: none"><li>- Adequate lighting</li><li>- Continuous adequate cleaning of the premises and the building services</li></ul>	<ul style="list-style-type: none"><li>- The building services must ensure suitable environment conditions</li></ul>

### 3.3. Disabled access

MINIMUM STANDARDS	OBJECTIVES FOR IMPROVEMENT
<ul style="list-style-type: none"><li>- Access to the building</li><li>- Short visitor route identified</li></ul>	<ul style="list-style-type: none"><li>- Provide alternative ways for the disabled to enjoy the exhibits whilst they are in the museum (e.g. virtual visits, dedicated routes)</li></ul>

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### 3.4. Security

MINIMUM STANDARDS	OBJECTIVES FOR IMPROVEMENT
<ul style="list-style-type: none"><li>- Compliance with security standards for the building, for people, and for the artefacts on display. The premises must be in compliance in relation to structural stability, building services, plumbing and drainage, and overcoming architectural barriers</li></ul>	<ul style="list-style-type: none"><li>- Prepare a risk analysis document for assessing emergencies, compensation and mitigation measures, and planning their management</li><li>- Prepare a plan for evacuating the collections from the museum</li><li>- Provide continuous staff training in all aspects of security</li><li>- Obtain adequate insurance cover</li><li>- Prepare a Facilities Report</li></ul>

## 4. Activities

The Activities area has been subdivided into two parts: (a) methods of access to the museum, and (b) the programme documents prepared by each institution.

(a) One important organisational aspect of museum activities is the need to ensure continuity of service. This begins with the opening days and times, which must necessarily take account of the location and size of the museum and the available numbers of invigilators and reception staff. In relation to these factors and to better respond to the demands of potential users, some museums may wish to consider concentrating their opening days and times into particular periods of the year (e.g. in summer) or particular days of the week (perhaps Saturdays and Sundays), but based on an at least annual programme that is properly publicised and must be respected.

(b) Another important organisational aspect is that each institution should have in place an effective annual programme of educational activities and initiatives and that it produces a subsequent report about the results achieved; these are essential programme documents for defining the institution's project and communicating it to all stakeholders, for activating partnerships and occasions for dialogue with the local region, and for ensuring that the institution has the necessary cultural recognisability.

### 4.1. Opening times

MINIMUM STANDARDS	OBJECTIVES FOR IMPROVEMENT
<ul style="list-style-type: none"> <li>- Opening at least 24 hours per week (including either Saturday or Sunday) and, in the case of seasonal opening, at least 100 days per year unless differently provided for by regulatory requirements</li> </ul>	<ul style="list-style-type: none"> <li>- Extend opening hours beyond the standard minimum</li> <li>- Coordinate with other museums in the region to define opening days and hours</li> </ul>

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### 4.2. Recording visitor numbers

MINIMUM STANDARDS	OBJECTIVES FOR IMPROVEMENT
<ul style="list-style-type: none"><li>- Timely recording of visitor numbers, including non-paying visitors</li></ul>	<ul style="list-style-type: none"><li>- Adopt electronic means for recording visitor numbers</li><li>- Offer an e-payment option</li><li>- Offer online booking and ticket sales, guided visits, and workshop activities for individuals and groups</li><li>- Offer discounts, family rates, conventions, integrated tickets, cards, annual subscriptions, free offers</li></ul>

### 4.3. Annual activities plan

MINIMUM STANDARDS	OBJECTIVES FOR IMPROVEMENT
<ul style="list-style-type: none"><li>- Annual activities plan setting out future initiatives, exhibitions and publications, and specifying the public to which they are addressed, as well as programming planned works for installing exhibitions</li></ul>	<ul style="list-style-type: none"><li>- Participate in networked projects, including the involvement of "heritage communities" as defined by the Faro Convention.</li><li>- Maintain a documentary record of activities and evaluate them</li></ul>

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### 4.4. Annual educational activities plan

MINIMUM STANDARDS	OBJECTIVES FOR IMPROVEMENT
<ul style="list-style-type: none"><li>- An annual educational activities plan setting out future projects, partnerships, and specifying the public to which they are addressed</li></ul>	<ul style="list-style-type: none"><li>- Participate in networked projects</li><li>- Maintain a documentary record of educational activities and evaluate them</li></ul>

## 5. Personnel

The importance of the personnel area also relates to defining minimum quality levels for enhanced appreciation, particularly for small museums. The presence of specific professional figures in the organisational diagram of a museum, or the structure of the rights holder, is essential for ensuring that the museum is correctly managed and is capable of defining an effective cultural project consistent with its stated mission, and of taking adequate action for its fruition and enhancement.

In the recognition or accreditation documents that are issued by Regional Governments, these professional figures and/or roles must be identified by each institution (or a museum network) as a fundamental prerequisite.

These professional roles are the Museum Director, the Collections Curator, the Educational Services Manager, the Administrative and Finance Manager, the Public Relations, Marketing, and Fundraising Manager, and the Invigilating and Reception Personnel Manager. The need for other figures such as a Security Manager results from applying the national regulations with which all institutions open to the public must comply. As necessary, in some cases these roles can be carried out by the Museum Director. Moreover in non-state museums, these roles can be shared.

See also the “Personnel” section of the ICOM Code of Ethics for Museums.

### 5.1. The Museum Director

MINIMUM STANDARDS	OBJECTIVES FOR IMPROVEMENT
<ul style="list-style-type: none"> <li>- A formally identified Director with the specific skills and professional experience, possibly sharing with other institutions</li> </ul>	<ul style="list-style-type: none"> <li>- Implement continuous training</li> </ul>

### 5.2. The Collections Curator

MINIMUM STANDARDS	OBJECTIVES FOR IMPROVEMENT
<ul style="list-style-type: none"> <li>- This role is fulfilled by an individual, possibly sharing with other institutions, who has the</li> </ul>	<ul style="list-style-type: none"> <li>- Implement continuous training</li> <li>- Identify dedicated roles</li> </ul>

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specific professional skills and has been formally assigned to the task	if the museum is organised in a network
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### 5.3. The Security Manager

MINIMUM STANDARDS	OBJECTIVES FOR IMPROVEMENT
<ul style="list-style-type: none"> <li>- A Security Manager (in Italy RSA and RSSP) has been identified, possibly sharing with other institutions, and has been formally assigned to the task</li> </ul>	<ul style="list-style-type: none"> <li>- Implement continuous training</li> </ul>

### 5.4. The Educational Services Manager

MINIMUM STANDARDS	OBJECTIVES FOR IMPROVEMENT
<ul style="list-style-type: none"> <li>- This role is fulfilled by an individual, possibly sharing with other institutions, who has the specific professional skills and has been formally assigned to the task</li> </ul>	<ul style="list-style-type: none"> <li>- Implement continuous training</li> <li>- Identify dedicated roles if the museum is organised in a network</li> </ul>

### 5.5. The Administrative and Finance Manager

MINIMUM STANDARDS	OBJECTIVES FOR IMPROVEMENT
<ul style="list-style-type: none"> <li>- This role is fulfilled by an individual, possibly sharing with other institutions, who has the specific professional skills and has been formally assigned to the task</li> </ul>	<ul style="list-style-type: none"> <li>- Implement continuous training</li> <li>- Strengthen administrative and financial management skills</li> </ul>

### 5.6. The Public Relations, Marketing, and Fundraising Manager

MINIMUM STANDARDS	OBJECTIVES FOR IMPROVEMENT
	<ul style="list-style-type: none"> <li>- Role must be fulfilled by an individual who has the specific professional skills</li> <li>- Provide continuous staff training</li> </ul>

### 5.7. The Communications Manager

MINIMUM STANDARDS	OBJECTIVES FOR IMPROVEMENT
<ul style="list-style-type: none"> <li>- This role is fulfilled by an individual who has the the specific professional skills including IT skills</li> </ul>	<ul style="list-style-type: none"> <li>- Provide continuous staff training</li> </ul>

### 5.8. Security and reception staff

MINIMUM STANDARDS	OBJECTIVES FOR IMPROVEMENT
<ul style="list-style-type: none"> <li>- Security and reception staff, wearing at least ID cards, are continuously in attendance during opening hours</li> </ul>	<ul style="list-style-type: none"> <li>- Identify a Security and Reception Manager</li> <li>- Provide continuous staff training</li> <li>- Should acquire the ability to work in English and/or another foreign language</li> <li>- Should be able to provide assistance for the disabled or address particular requirements using specific professional skills</li> </ul>

### 5.9. The Internal and External Human Resources Manager

MINIMUM STANDARDS	OBJECTIVES FOR IMPROVEMENT
	<ul style="list-style-type: none"><li>- Periodically carry out staff audits and staff satisfaction assessments</li></ul>

## COLLECTIONS

The most important task of every museum is managing and caring for its collections, as the constituting element and *raison d'être* of the institution itself. Artefacts are added to the collections with reference to the mission of the museum and on the basis of approaches and methods that are defined by its governing body, in respect of the applicable regulations. Other than in exceptional cases provided for by law, the collections are inalienable and the museum must ensure that they are conserved, managed, and cared for:

- by ensuring that they are suitably positioned in spaces that are sufficient, appropriate, and secure;
- by recruiting sufficient numbers of qualified staff in relation to the dimensions and types of the artefacts conserved;
- by preserving their integrity, adopting defined measures to prevent the risks to which they may be exposed, and adequate means for intervening in emergencies;
- by permanently maintaining the inventory, catalogue, and documentation of the artefacts;
- by promoting knowledge about the artefacts, how they are ordered, and how to interpret them;
- by developing study and research that begin from the collections and from the museum's own mission and mandate.

A museum must also ensure full physical and intellectual access to the collections by providing for their public enjoyment, above all by putting them on public exhibition either permanently or temporarily, and by ensuring that they can be consulted and known about.

All museums must formally adopt operational measures and procedures that ensure the permanent conservation of their collections.

Respect for legal status, finance, personnel, premises, and safety standards is an essential prerequisite for properly managing and caring for collections.

The two primary requirements of conserving the collections and making them available for enjoyment must be harmonised by how the museums manage them. In that regard the general approaches given in the ICOM Code of Ethics for Museums in its Founding Statement of 2001, and the sections headed "Acquiring collections", "Removing collections", "Care of collections", "Primary evidence" "Museum collecting & research" are especially important.

## 1. Periodically monitoring the state of conservation of the artefacts

MINIMUM STANDARDS	OBJECTIVES FOR IMPROVEMENT
<ul style="list-style-type: none"> <li>- Periodic monitoring of microclimatic conditions (temperature, relative humidity, light levels)</li> <li>- Monitoring and preventing attacks by organisms (insects and rodents) and micro-organisms (bacteria and fungi)</li> <li>- The artefacts, displays, and green areas are routinely maintained</li> </ul>	<ul style="list-style-type: none"> <li>- Implement annual and multi-annual maintenance plans</li> <li>- Implement annual restoration plans</li> <li>- Assess and document states of conservation (conservation records)</li> </ul>

## 2. Formal management and control of the procedures for moving artefacts

MINIMUM STANDARDS	OBJECTIVES FOR IMPROVEMENT
<ul style="list-style-type: none"> <li>- Formalised procedures are in place for moving artefacts internally and externally</li> <li>- A named individual is responsible for moving artefacts</li> </ul>	

## 3. Adding to the collections

MINIMUM STANDARDS	OBJECTIVES FOR IMPROVEMENT
<ul style="list-style-type: none"> <li>- A policy document exists for acquisitions and implementations of artefacts, consistently with the institutional mission</li> </ul>	<ul style="list-style-type: none"> <li>- Produce periodic reports on acquisitions and implementations of artefacts</li> </ul>

## 4. Recording, documenting, and cataloguing the collections

MINIMUM STANDARDS	OBJECTIVES FOR IMPROVEMENT
<ul style="list-style-type: none"> <li>- A sequential, unambiguous record is kept of collections/inventory of artefacts</li> <li>- Data sheets are maintained, with adequate iconographic documentation, identifying each artefact</li> <li>- A record is kept of any incoming or outgoing artefact that may be kept by the museum itself or at another place of culture</li> </ul>	<ul style="list-style-type: none"> <li>- Maintain an updated estimate of the value of the collection</li> <li>- Maintain an inventory of assets</li> <li>- Maintain a computerised catalogue that meets regional and national cataloguing standards, with an identification sheet and adequate photographic documentation for each artefact</li> </ul>

## 5. Permanent exhibitions

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MINIMUM STANDARDS	OBJECTIVES FOR IMPROVEMENT
<ul style="list-style-type: none"> <li>- Artefacts are selected, ordered and presented on the basis of a scientific project, highlighting the criteria and rationale for these decisions</li> <li>- Historic displays are documented photographically (when displays are renewed)</li> </ul>	<ul style="list-style-type: none"> <li>- Plan for the rotating display of artefacts that are kept in storage</li> </ul>

## 6. Temporary exhibitions

MINIMUM STANDARDS	OBJECTIVES FOR IMPROVEMENT
<ul style="list-style-type: none"> <li>- The temporary exhibitions policy is set out in a programme document</li> </ul>	<ul style="list-style-type: none"> <li>- Produce periodic temporary exhibition reports that include data on visitor numbers</li> </ul>

## 7. Study and research programmes and activities

MINIMUM STANDARDS	OBJECTIVES FOR IMPROVEMENT
<ul style="list-style-type: none"> <li>- Study activities about the collections and sites are adequately documented</li> </ul>	<ul style="list-style-type: none"> <li>- Adopt multi-annual programming for study and research activities</li> <li>- Formalise relations with other research bodies and institutions</li> <li>- Compile a complete scientific catalogue of the museum</li> <li>- Prepare a plan of scientific and popular publications about the collections</li> <li>- Adopt a strategy for communication about research activities in the IT context</li> </ul>

## 8. Storage of artefacts

MINIMUM STANDARDS	OBJECTIVES FOR IMPROVEMENT
<ul style="list-style-type: none"> <li>- Artefacts not on display are categorised and conserved in accordance with criteria of functionality and security</li> </ul>	<ul style="list-style-type: none"> <li>- Ensure that the artefacts store can only be consulted upon motivated request, and that it is only accessible to the public on particular occasions</li> </ul>



# COMMUNICATION AND RELATIONS WITH THE REGION

## 1. Relations and communication with the public

The institutional goal of a museum is to offer the public a cultural service that is essentially based on the conservation and enhancement of its collections. Communicating knowledge about these collections and promoting them are fundamental tools for fulfilling that mandate. Communication should both be informal, for example via an information point, and formal via signage that should include the identifying information of each artefact on display, as well as printed or online informational material. The museum must be careful to ensure that this information is always complete and up to date, and is also in English and other languages as necessary.

It is essential that all museums have good-quality signage which, in different ways, makes it easy for visitors, including the sensory or cognitive disabled, to orientate themselves and enjoy the spaces; in larger museums in fact, the size of the building can disorientate visitors, tiring them physically and psychologically. Indispensable tools for making it easy for visitors to orientate themselves include an overall plan of the building and the site, identifying each space, together with a coordinated signage system that uses signs, pictograms, and short words indicating the positions of entrances, exits, services, and routes. As well as providing orientation guidance for visitors, museums must be sure to provide general information (opening days and times, prices of tickets and activities, etc.); about the services provided including any that are not available; about the collections; and about any rooms that are closed. A coordinated signage system should be in scale with the dimensions and amplitude of the museum spaces. One fundamentally important tool is a plan of the spaces, accompanied as appropriate by the information just described, as an informational aid that should be present in all museums.

Sufficient space should also be given for the use of technologies. The importance of the internet as the first approach between users/visitors and museums has often been emphasised. It is therefore of primary importance that online information – via social networks, applications, etc – should be available about access to the museum, its services, collections, and additional activities and that these are effective in keeping this information complete and up-to-date. These aspects are all the more fundamental given the importance of meeting the information requirements of tourists who may be far away, or of particular types of user (for example, disabled people wishing to check whether the building and exhibitions are accessible) and of opening up as much as possible towards categories of people who do not currently visit museums, particularly the younger generations, who are frequenting museums less and less,

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evidently because they are not attracted to them. Visitors should be offered multimedia tools which provide information that integrates with the traditional information systems, using text messages, images, audio, and video via apps that can be downloaded to the latest tablets and mobile telephones and, more generally, that are edutainment, i.e. give information about a wide range of activities that activate knowledge in amusing, relaxing ways.

This includes promotional activities such as announcements about exhibitions and events or spaces that are available for initiatives of public interest, etc. as the public face of the museum; this is often the first encouragement to the public to make contact directly with a cultural institution. Exhibitions and events, in particular, should align with the mission and policies of the museum and should always guarantee the quality and state of conservation of the content/material on display. In the case of temporary exhibitions, the internationally agreed general principles for managing loans and exchanges of artefacts must also be taken into consideration.

This area includes, on the one hand, the mediation tools and activities that the museum makes available to visitors for decoding the cultural value of its artefacts and disseminating knowledge about them (e.g. brief guides and catalogues) and on the other hand, the activities and initiatives that bring the public closer to the museum such as events, workshops, visitor surveys, and more.

It is particularly important that tools should be available that provide information and communicate the meanings of the artefacts. The desire for knowledge is the main reason why visitors come to museums. The content of the different visitor tools must fit into a coordinated system of communication that enables a relationship to be created between the visitor and the artefacts. In this regard many factors must be taken into consideration: the types of artefacts and whether there is, or is not a relationship between these artefacts, the decisions that have been taken about how they are displayed, the physical space in which they are displayed, etc. It is particularly important that museums and similar institutions must do everything possible to satisfy the growing diversification of society ethnically, socially, culturally, and in terms of gender, age, etc. And in that regard, all activities aimed at public knowledge in order to orientate policies and initiatives are particularly useful. Various tools can intercept interests and needs, including questionnaires, focus groups, online surveys, visitor registers, observer surveys, etc. In fact it is by using services and offers aimed specifically at distinct target audiences that institutions can “mediate” their informational content by activating a multiplicity of learning processes in each individual, stimulating diversified types of learning.

Particular weight should be given to the topic of transparency, to which museum institutions are called upon to respond as providers of a public service. One key aspect of this is the need to develop a Service Quality Charter that relates to the specific mission of the museum. This document, which is obligatory for all institutions/offices that provide services to the public, identifies the minimum quality standards for providing those services,



and is not only a form of “accounting” and commitment to users, but also a self-evaluation tool for use by the institutions themselves.

In this regard see the “Exhibitions” and “Other resources” of the ICOM Code of Ethics for Museums.

### 1.1. Signage

MINIMUM STANDARDS	OBJECTIVES FOR IMPROVEMENT
<ul style="list-style-type: none"><li>- The full name of the institution and its opening hours are clearly and prominently displayed outside the building</li><li>- Essential informational and orientation tools (informative, directional, and identifying signage) are present within the museum or the site</li></ul>	<ul style="list-style-type: none"><li>- Signpost the approach routes</li><li>- Include the institution in search tools (such as Google Maps etc.)</li></ul>

### 1.2. Informational tools

MINIMUM STANDARDS	OBJECTIVES FOR IMPROVEMENT
<ul style="list-style-type: none"><li>- A specific website or section within the organisation provides essential and updated information about the museum, its institutional documents, collections, services, and activities</li><li>- Informational material is provided about the museum, its collections and services, and the region</li><li>- A catalogue and/or a short guide to the museum or site is available</li><li>- Information is provided about assistance, tools and activities for the disabled</li></ul>	<ul style="list-style-type: none"><li>- Provide online information in multiple languages, with English as a minimum, about the museum, its collections and services, and the region</li><li>- Provide information material within the museum, including in foreign languages</li><li>- Provide a catalogue and/or a short guide to the museum, including in foreign languages</li><li>- Provide an audio guide, including in foreign languages</li><li>- Provide a multimedia guide, including in foreign languages</li><li>- Provide specific tools for people with sensory or cognitive disabilities</li></ul>

## UNIFORM QUALITY LEVELS FOR MUSEUMS

### 1.3. Integrated communication in the display

MINIMUM STANDARDS	OBJECTIVES FOR IMPROVEMENT
<ul style="list-style-type: none"><li>- Captions and information panels or mobile cards give clear and legible information</li></ul>	<ul style="list-style-type: none"><li>- Provide captions and information panels or mobile cards, including in foreign languages, preferably English</li><li>- Provide multimedia tools about the museum, its collections, and the region</li><li>- Provide downloadable software and apps for mobile devices about the collections and temporary exhibitions</li><li>- Provide tools that facilitate disabled access to the collections</li></ul>

### 1.4. Educational activities and activities that enhance appreciation of the collections or promote them

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MINIMUM STANDARDS	OBJECTIVES FOR IMPROVEMENT
<ul style="list-style-type: none"><li>- Educational activities for different visitor groups</li><li>- Guided visits and themed routes</li></ul>	<ul style="list-style-type: none"><li>- Workshops for different visitor groups</li><li>- Events that promote the collections, the museum, and the region</li><li>- Temporary exhibitions that are directly relevant to the collections and the cultural values of the region</li><li>- Specific promotional activities for non-visitors or potential visitors</li><li>- Cultural and social mediation</li><li>- Guided visits and themed routes in other languages</li><li>- Training sessions for teachers, educational staff, or other users</li><li>- Agreed projects with schools, including within alternating</li></ul>

- school-work programmes, that award educational credits
- Jointly develop agreed educational programmes and the educational training offer, with the Ministry responsible for regional education/school offices and/or schools of various types and levels
- Seminars on specialist content

## 1.5. Relations with the public

MINIMUM STANDARDS	OBJECTIVES FOR IMPROVEMENT
<ul style="list-style-type: none"> <li>- The main contacts and an email address are given on the website</li> <li>- A formalised complaints procedure is in place that gives response times and the name of the person to contact</li> <li>- A Service Charter has been adopted and published</li> </ul>	<ul style="list-style-type: none"> <li>- Publish an updated newsletter at least monthly</li> <li>- Update the museum's presence on blogs or social networks at least weekly</li> <li>- Maintain and monitor a register (paper or online) of visitor observations and suggestions</li> <li>- Carry out a customer satisfaction survey and analysis at least once per year, specifying the tools used</li> <li>- Carry out surveys of non-visitors in order to (inter alia) verify user needs and expectations</li> <li>- Accountability procedures: publish reports about the results that were expected in the annual programme and the objectives that were attained</li> </ul>

## 2. Relations with the region and stakeholders

It is in the nature of the cultural institutions in Italy, which are so widespread and numerous across the country, that this area is particularly relevant for identifying uniform levels of enhanced appreciation. There are also social and economic reasons that make it necessary and opportune to develop a culture of networked relations between museums, places of culture, monuments, and different expressions of the local region, as well as to create an inter-museum system of cultural activities and services, to build reciprocally advantageous alliances between different institutions operating in the same local region. This line of orientation, which is consistent with the development of systems of regional museums within the framework of the national system of museums, can be implemented by adopting integrated enhancement plans that involve different institutions or bodies, and can generate positive induced effects in those organisations as well as in other sectors such as tourism, infrastructure, and manufacturing industry in general.

In this regard, see the “Origin of collections” and “Respect for communities served” sections of the ICOM Code of Ethics for Museums.

The Council of Europe Framework Convention on the value of cultural heritage for society (more commonly known as the “Faro Convention”) is also important in this regard. That document, particularly in Part III, draws attention to the importance of sharing responsibility for cultural heritage and community participation so that in managing cultural heritage it is possible, *inter alia*, to develop the legal, financial and professional context that makes possible joint action by public authorities, experts, owners, investors, companies, NGOs and civil society, and that also respects and encourages voluntary initiatives that complement the roles of the public authorities.

This area is subdivided into three general lines of orientation: (i) consolidating the regional vocation of the museum not only formally in planning documents, but also by using visitor aids to contextualise the artefacts in their regional setting; (ii) involving local and regional bodies in the activities of the museums and in enhancing their appreciation, for example by jointly planning and producing exhibitions, sharing locations for the storage of artefacts, preparing and promoting tourism and cultural itineraries, and introducing forms of shared pricing; and (iii) promoting the region by disseminating, at each institution, printed or multimedia information about other museums in the area.

In recent years, innovation in the public administrations has put a particular focus on the topic of transparency and accountability. In fact and as the ICOM Code of Ethics emphasises, the public administration, as a provider of services for the public, must share its cultural project with the stakeholders and involve them as much as possible, particularly “Friends of the Museum” groups and similar associations, thereby creating favourable conditions for obtaining support for their planned activities. Furthermore, the importance of understanding the needs of visitors and the users



of the services, and of all the other different stakeholders, must not be overlooked. These consultations help to more effectively orientate the activities of the museum towards the needs of different types of users. The stakeholders change as the services and activities provided by the administration change, and as a consequence their weight and importance is variable. The categories of interlocutors that have been identified are: voluntary associations, cultural associations, organisations of various kinds that represent the local communities and economic operators, the universities and cultural institutions operating in the region, and private owners of cultural assets. For reasons of homogeneity, local and regional bodies that are also stakeholders have been included in this "Relations with the Region" area.

### 2.1. Tasks and roles in the regional

MINIMUM STANDARDS	OBJECTIVES FOR IMPROVEMENT
<ul style="list-style-type: none"><li>- In planning documents, indicate the tasks and functions that the institute carries out referring to the regional context</li></ul>	<ul style="list-style-type: none"><li>- Stipulate cooperation agreements when carrying out common functions</li></ul>

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### 2.2. Placing the collections/museum/archaeological site in the regional context

MINIMUM STANDARDS	OBJECTIVES FOR IMPROVEMENT
<ul style="list-style-type: none"><li>- Elements are present that relate the collections to their historic, cultural, and environmental contexts</li></ul>	<ul style="list-style-type: none"><li>- Indicate programmes and study and research to be carried out in the regional context, in collaboration with other institutions and stakeholders</li></ul>

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### 2.3. Involving regional bodies or institutions

MINIMUM STANDARDS	OBJECTIVES FOR IMPROVEMENT
<ul style="list-style-type: none"><li>- Analysis of the regional context and of the individual or collective actors operating in it</li></ul>	<ul style="list-style-type: none"><li>- Carry out studies and research on the material and immaterial collections of the region of reference</li><li>- Integrate with cultural services and museum networks</li><li>- Prepare and promote tourist and cultural itineraries</li><li>- Implement co-produced or co-programmed initiatives</li><li>- Develop offers for the disabled and share them with associations, facilities, schools, and operators</li><li>- Prepare forms of tariff subsidy with (inter alia) the hospitality sector and transport companies</li><li>- Verify the effectiveness and impact of collaborative activities</li><li>- Activate systematic relationships with the training, artisanal, and industrial sectors and that propose the institution as a cultural and historical strong point in the region (including for the development of creativity, design, and know-how)</li><li>- Participate in networked projects</li></ul>

## 2.4. Involving stakeholders

MINIMUM STANDARDS	OBJECTIVES FOR IMPROVEMENT
<ul style="list-style-type: none"><li>- In the policy documents of the institution, identify stakeholders and possible tools for dialogue</li></ul>	<ul style="list-style-type: none"><li>- Define agreements and initiatives with the stakeholders, also having regard for the sectoral associations in relation to the offer for the disabled</li><li>- Verify, with the stakeholders, the effectiveness and impact of the activities in relation to cultural, economic and social policies via periodic reports and public sharing initiatives</li></ul>

