

**„LUCIAN BLAGA” UNIVERSITY OF  
SIBIU  
FACULTY OF ECONOMICS  
DOCTORAL SCHOOL**

*Contributions to the improvement of the performance management in the  
Romanian museum institutions*

Case study: ASTRA National Museum Complex of Sibiu

**SUMMARY OF THE PhD Thesis**

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Key words: museum – performing museum, performance – museum performance, performance management, exploratory research, strategy, SWOT analysis, Balanced Scorecard, vision, mission, patrimony, public, learning organization.

*Contributions to the improvement of the performance management in the Romanian museum institutions*

Case study: ASTRA National Museum Complex of Sibiu

The topic of the PhD thesis proposes a scientific approach of the performance management in relation with museums as representatives of the public cultural sector, emphasizing the ways of building a strategy to define and measure the performance. In the theoretical part, the thesis structure points out the importance of treating the museums as some organizations which administer the cultural heritage and which shall be managed by applying the management principles. In the practical part, it emphasizes the methodology in planning the performance improvement within the ASTRA National Museum Complex of Sibiu. The scientific approach is based on the belief that the performance of the museums depends mainly on the quality of the strategic performance management process.

The research, initiated and developed in the PhD thesis during 2010-2014, has as a general objective the elaboration of a methodology in planning the performance improvement within the ASTRA National Museum Complex of Sibiu, and as specific objectives:

- ✓ To define the main theoretical concepts concerning the museum as an organization;
- ✓ To analyze the paradigms of the museum as a space for heritage communication; from the “privilege to visit a museum” to the “satisfaction of the public’s needs”;
- ✓ To analyze to the way in which the new paradigm for the public management (the approach directed towards market and performance) influences the transition from the classical system (bureaucratic) to an entrepreneurial approach;
- ✓ To identify the performance need in the museum institutions;
- ✓ To elaborate a definition of the performing museum;
- ✓ To elaborate a SWOT analysis of the objectives and management processes within the ASTRA National Museum Complex of Sibiu;
- ✓ To elaborate a strategy of planning the performance within the ASTRA National Museum Complex of Sibiu, by using the *Balanced Scorecard* methodology.

The aim of the topic under discussion in this PhD thesis is *to clarify the museum’s position towards obtaining performance in the context of the accelerated dynamics of the social changes.*

### *Theoretical research*

The theoretical research had in view a bibliographical study in order to fulfill the specific objectives of this thesis: defining concepts related to museum – museum performance – performance management; the necessity to insert a performance management system in the museum institutions; the ways to use a Balanced Scorecard methodology as a means for planning the performance in the museum institutions. The studied bibliography reflects the multi and inter-disciplinary character of this thesis, the bibliographical sources originating in fields such as: management, museology, anthropology, sociology, etc.

In the theoretical part of this thesis, over three entire chapters, we went deeply into issues related to:

- *The paradigm of the museum between institution and organization*, necessary to apply a adapted management methodology in order to obtain the performance. In our opinion, the performing museum must be seen as a *learning organization*<sup>1</sup>, imposes itself (through awareness and professionalism), takes upon itself and reaches additional standards apart from the functioning ones (sufficient for survival) established on the basis of knowledge and learning. The course of the museums in the last 25 years has proven that they have a great capacity of learning, transforming themselves from “ideological cans” into “communication spaces”.
- The (re)positioning of the museum in society. The museum is no more a simple storehouse of some cultural objects/ goods, but it adapts itself to the functional needs and to the social and cultural context. If the museum was a conservation and exhibition place, a “temple of arts” in the past, it has now changed into a place of experiences and events, a favorable environment for interaction and social communication. In order to talk about performance in a museum, starting from its mission, vision and objectives, it is essential to understand its positioning as a holder of heritage goods in society. What differentiates it from the other similar institutions: libraries and archives, for instance? Our answer lies in the authenticity of the heritage goods, by constructing another type of discourse and a different approach in the openness towards the public.
- The concerns at national and international level for a new approach of the management in the public institutions, the *New Public Management*. The relevance of the topic

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<sup>1</sup> The learning organization was defined by Peter Senge as an “organization which continually extends its capacity create its future. For such an organization, it is not enough to survive. The survival learning or as it is often termed the adaptive learning, is not only important, it is indeed necessary. But for an organization which is learning, the adaptive learning must be joined by the generative learning, that type of learning which helps us to enhance our capacity to create.” Peter M. Sege, *A V a disciplină. Arta și practica organizațiilor care învață*, translation by Olivia Cristina Podobea, Bucuresti, Editura Business Tech International, 2012, p. 36.

concerning the necessity to obtain the performance in the museum is also given by the concerns for a new approach of the management in the public institutions. The characteristics relatively similar to the Romanian legal context, applicable also to the museums (The Government Emergency Ordinance 189/2008 concerning the management of the public institutions of culture, Decree no 946/2005, issued by the Ministry of Finance, concerning the Code on the Internal Managerial Control), are the following: the freedom of the managers in coordinating the problem solving; application of the performance measures; adaptation of the management style from the private sector; introduction of control when using the resources; fixed-term contracts (intensification of the competition and public procurement procedures)

The *New Public Management* rhetoric can be seen as “an assault” on the traditional hierarchical structure, as being over-estimated, non-performing, against the implementation of profitable and valuable doctrines and against the responsibility for the results obtained.

The possibility to know the management reforms led by the *New Public Management* and their influence on the museum fields in the United States of America, Australia, New Zealand, England and Taiwan, was offered by the comparative study called *International Comparison of National Museum. Performance Indicators*, carried out by Yung-Neng Lin<sup>2</sup>, used as a secondary source of information.

### *Exploratory Research*

The proposed research model is built on the exploratory research which analyzes, from a new and innovating perspective, both the museology and management fields, allowing “a more profoundly understanding of the concepts and of the essence of the phenomena and processes held in view”<sup>3</sup>.

The research mainly used qualitative methods and techniques – the exploratory technique: direct observation, interview, informal discussions, analysis of content, use of secondary data (comparative study) and case study in order to test the hypotheses initially elaborated by us. There were analyzed the planning and evaluation documents of the ASTRA Museum<sup>4</sup> as well as the observations and information acquired informally during this period.

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<sup>2</sup> Yung-Neng Lin, *International Comparison of National Museum. Performance Indicators*, in „The Journal of the Inclusive Museum”, vol. 4, no. 1, 2012, <http://museum-journal.com>; accessed in juin 2014

<sup>3</sup> Constantin Lefter, *Cercetări de marketing. Learning aid*, Transilvania University of Braşov, Faculty of Economics, 2003, page 26. <https://www.scribd.com/doc/52594736/Cercetari-de-Marketing>; accessed in juin 2014.

<sup>4</sup> The position held in the leading structure of the Museum, during the 2007-2015 period, offered me the possibility to have as main responsibility the drawing and monitoring of these documents based on quantitative and qualitative information collected from departments and wards.

Within this context, there were held informal discussions with the leading team and four interviews with the employees and former employees in top positions and middle management, experts in the issues held in view. The questionnaire was applied to the specialists in the museum field.

For an objective evaluation of the results obtained following the development of the exploratory inquiry, we defined the general theoretical aspects concerning the performance. Although the performance is a subjective concept, difficult to be defined, the experts in this field assign to it various meanings. During our approach to “build” the performance, we had many informal encounters with the leading team of the ASTRA Museum concerning the (re)defining of the museum vision, mission and objectives, the defining of the museum performances, the establishment of the performance indicators.

The exploratory research concerning the performance in the museum aimed to:

- Define the museum performance and the performing museum;
- Identify the factors influencing the performance in the museum;
- Identify the factors of resistance to change;
- Identify the performance indicators;

By analyzing the documents, direct observations, informal discussions and answers to the questionnaire, it was aimed to:

- Realize the diagnosis of a given situation (SWOT for the management objectives and processes from the ASTRA MUSEUM) and the analysis of some indicators with a defining role in obtaining the performance (the evolution of the ASTRA Museum during 2010-2014)
- Identify a methodology of planning the museum performance within the ASTRA Museum, which could become a good practice model for other museum institutions

The research started from the following hypotheses:

General hypothesis: *by applying an effective management system a museum can become more performing.*

Hypothesis 1. *The performance is given by – the value of the heritage (according to the Law 182/2000 concerning the protection of the moveable cultural heritage); the quality of the research results; an effective management through vision, strategy and results;*

Hypothesis 2. *The performance is mainly influence by the internal factors – management – than by those from the external environment.*

Hypothesis 3. *A functional museum is not necessarily a performing museum.*

Hypothesis 4. *The museum is not motivated to obtain the performance.*

The *research design* focused on three elements: museum – performance – management, is the following:

The research theme has a multi- and inter- disciplinary character: *Museum – Performance – Management*.

The research aim: *clarification of the museum positioning towards obtaining the performance within the accelerated dynamics of the changes in society*.

Period: *the research was done during 2010-2014*

Case study: *the ASTRA National Museum Complex of Sibiu*.

Type of research: *exploratory research*.

Research issue: *the necessity to obtain/ improve the performance in the museum*.

Research objective: *to elaborate a methodology of planning the performance improvement within the ASTRA National Museum Complex of Sibiu*.

The questions used in the research:

- *What is a performing museum?*
- *What are the performance indicators in a museum?*
- *What are the factors of resistance to change within the museum management field?*

Research methods: direct observation; explanatory inquiry; interview; informal discussions; content analysis; use of secondary resources of data – comparative study Yung-Neng Lin *International Comparison of National Museum Performance Indicators*.

The research design focused on three elements: museum – performance – management.

## Museum

According to the legislation in force<sup>5</sup>, the museum is the “non-profit making cultural institution of public or private law, in the service of the society, which acquires, safeguards, research, restores, communicates and exhibits for purposes of study, education and recreation, material and spiritual testimonies of the existence and evolution of the human being communities and of their environment”.

The museum gathers, safeguards and exhibits objects which show the life of a community being obliged to give its identity essence back to it by using the resources which are given by it too. In the last 25 years, the Romanian museums have proven a great capacity of learning, by changing themselves from *ideological cans* into *communication spaces*.

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<sup>5</sup> Law no 311/8 July 2003 on the museums and public collections (republished and revised).

The museum is an organization – an opened system, with entrances (human, financial, material, information and non-acquirable resources), processes (formalized or not) and exists: (cultural products: cultural goods and services). The museum is no more a simple storehouse of cultural goods/ objects, but it is adopted to the functional needs and to the cultural and social context. If the museum was a conservation and exhibition place, a “temple of arts” in the past, it has now changed into a place of experiences and events, a favorable environment for interaction and social communication.

### Performance

The scientific approach was also made more difficult because of the fact that the research in the performance and the performance management field in the Romanian museums, is very limited. There have been published only a few works on the museum management so far. Among them, we take the liberty to mention the book signed by Ioan Opriș<sup>6</sup>, *Management muzeal (English translation of title: Museum Management)*, with a museological perspective, and *Manual de management muzeal și educație muzeală (English translation of title: Handbook on Museum Management and Museum Education)* which reunites many more studies under the slogan “a museology lesson taught in the Dutch style”<sup>7</sup>. The foreign specialized literature dedicated to the performance management offered us the confirmation of the necessity for approaching the performance management in the Romanian museums.

The performance can be defined as an evolving and changing standard which can be defined/ delimited, implemented and analyzed only in relation with a strategic vision which plans it as such and which functions as a reference system for it.

Ion Verboncu defines the performance as being “a remarkable result obtained in the field of the economic, cultural management, etc., which imprints the competitiveness,

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<sup>6</sup> Ioan Opriș, *Managementul muzeal*, Târgoviște, Editura Cetatea de Scaun, 2008.

<sup>7</sup> *Manual de management muzeal și educație muzeală*, Asociația Muzeelor din Olanda, Amsterdam, 2010. The work is the result of the project “Matra. Strengthening the National Network of Romanian Museums and its members”, developed during 2009-2010. The project, funded by the Dutch Ministry of External Affairs, through the Dutch Museum Association, aimed to consolidate the Romanian National Network of Museums as well as to stimulate the competences of the employees from the museums, in the museum management museum education fields”.

efficient and effective characteristics of the organization and its procedural and structural components<sup>1</sup>.

In museum cases, we can state the fact that the performance depends on the quality and level to which the social contract is fulfilled, on how well it responds to the needs of its beneficiaries. The operational results of a museum, shown by the key indicators of performance are not the same with the result indicators, those which show in fact the real social impact of the activities of a museum – the latter are more difficult to define and measure, but are essential in defining a museum as fulfilling indeed its function in society.

The defining and use of the key indicators of performance must form the structure for the analysis of the real, current museum performance at a given time when there is a necessity to improve the strategies in order to maintain the success<sup>2</sup>.

For us, the necessity to obtain performance in museum, was quite clear when the inquiry was carried out. The affirmative response of the respondents<sup>3</sup> did nothing else but to strengthen and increase the objectivity of the research topic. Apart from some confirmation or invalidation questions, the other questions from the questionnaire were open questions.

After analyzing the content answers at the questionnaire, the performance in museum is influenced by the effective management and employees' professionalism; and by exhibiting the heritage to the general public.

The interviews realized and the responses to the questionnaires led us to define the performance from the Romanian museums as being *a result of excellence, not only a fulfillment of the performance indicators which indicate its functionality at one moment in time, at a certain level*. Thus, in the case of museums, and we could extend this statement over all the public institutions, when defining the performance, there interferes also *excellence*<sup>4</sup>.

<sup>1</sup> Ion Verboncu, *Eficiență și eficacitate în management*, in Ion Verboncu, Caius Mihai Apostu, Denis Mugurel Gogîrmoiu, Michael Zalman, *Management. Eficiență, eficacitate, performanțe* București, Editura Universitara, 2013, pages 74-75.

<sup>2</sup> NHS Institute for Innovation and Improvement. Performance management. [http://www.institute.nhs.uk/quality\\_and\\_service\\_improvement\\_tools/quality\\_and\\_service\\_improvement\\_tools/performance\\_management.html](http://www.institute.nhs.uk/quality_and_service_improvement_tools/quality_and_service_improvement_tools/performance_management.html); accessed in May 2015.

<sup>3</sup> The analysis was done by means of an inquiry based on a questionnaire concerning the *Performance in Museums*. The Questionnaire was created and applied on-line; it was sent to specialists from museums, universities and research institutes of the Romanian Academy. The data thus obtained from 89 specialists were valorized/ analyzed through the content analysis method.

<sup>4</sup> The National Audit Office of England suggests that a fourth E be evaluated in the case of museums – the equity. In this case, equity refers to the social and regional accessibility of museums. Yung-Neng Lin, *op.cit.*, p. 69.

*A.A. - I think the performance can be termed as high efficiency and excellence. A fulfillment above the medium level. A permanent desire to reach some standards fixed above mediocrity. A continuous development rather than the keeping of a status quo.*

*V.O. – To my mind, a performing museum means a museum grounded in reality. In a certain way, a museum has always something to show and present to the people or contemporaries, in the locality or area in which it carries out its activity.*

*M.I. – I think that the museum performance that I define as a measure by means of which the museum fulfills its mission in society, is directly proportional to the – quantitative and qualitative – availability of the resources (human, financial, materials), environment stability, employees' earnestness and ethics, dedication towards the constant improvement of the processes and openness to changes on the professional level.*

*Sibiu, Specialist in museography – In a museum, the performance is influenced by internal factors such as: the value of heritage goods the professionalism of its specialized personnel, the material means at its disposal, management system, the planning and implementation of the museum education; and the influence of the external factors can be seen in the field of competitiveness, of the productive cultural and valuable collaborations.*

## **Management**

If, for the private sector, the performance is associated to the financial profit level, for the public sector, implicitly for the museums, the performance refers to the impact on the beneficiaries: the impact of the institution activity on the society; the beneficiaries' level of satisfaction; their number.

The implementation of the principles of the New Public Management in the scientific management of the public institution performance, of the museums included, implies the adaptation of some methods from the private sector to the public sector just because performance means the 3 Es and in the case of the public ones, excellence in meeting the objectives regardless the profit nature.

- ✓ The museum/ cultural public institution role – satisfaction of social expectations/ needs.
- ✓ The museums/public institutions are usually led by managers coming from specialists in the field.
- ✓ Lack of the market as an output – the public sector doesn't usually function with a system for measuring the results based on the financial profit.
- ✓ The museums/ public institutions are confronted with legal restrictions such as:
  - From the external environment (they can choose/ change their mission and objectives only by respecting the legal functions; there is a much more accentuated public control; the beneficiaries' exigencies are much more higher);
  - From the internal environment (a high level of formalization, a bureaucracy with a big number of procedures which „burden” the managers' autonomy in taking the decisions; they don't have that flexibility in hiring, dismissing or promoting their personnel, etc.).

*Case Study: The Astra National Museum Complex of Sibiu*

We brought into discussion the ASTRA National Museum Complex, being representative for what happened in the Romanian museum management field. The results obtained entitle us to consider it as a performing museum (generalized public perception), but an attentive analysis proves that it is *a museum which could be design as a performing one through the development and implementation of the management strategies.*

In this research, the *Balanced Scorecard* methodology is used as a means of planning (and only then as one of evaluation through the x-ante analysis). The aim is to correctly design the performance indicators by using the Balanced Scorecard methodology which could lead, when they are reached, to the strengthening of their role in society.

After analyzing the 2010-2014 period and realizing the SWOT analysis of the ASTRA Museum, we could formulate the vision, mission, strategic challenges, objectives and performance indicators which should be reached when a new management strategy is implemented.

## Vision

*The ASTRA Museum is well-known, through an effective management, on the cultural-touristic offer market, as a communication space of its heritage (edutainment), playing a fundamental role in acquiring, safeguarding, researching and enhancing the heritage value*

## Mission

*A museum which opens its collections, adapted to the needs of the society.*

## The ASTRA Museum Challenges

- ✓ Adaptation to the changes of the social, cultural, political and economic environment.
- ✓ Development of the education role in society.
- ✓ The research impact from the field of the social sciences developed in the Museum on the society improvement (the multi- and inter- disciplinary approach)

## Personal contributions:

The significant contributions of the research can be found in the managerial theory and practice by clarifying the theoretical, methodological and applicative aspects specific to the process of performance improvement, as an excellence functioning, within the museum organizations:

- The pluri-disciplinary approach starting from the museum specialist (ethnographer) to the integration of some techniques which concern the strategic planning and performance measuring into the current management activity.
- The joint between the museology and management, a thing which confers an innovating character to the Romanian research area;
- The perspective offered by the research results is relevant for many more segments of the public or private sector directly influenced by the museum performance (the cultural tourism or creative industries);
- The proposal to implement some new planning and forecasting techniques, such as the *Balanced Scorecard*, in the museum institutions;
- The approach of some aspects specific to the content of the relations between the performance as excellence or high-efficiency and the performance as functioning, a term

used when establishing the performance key factors and taken over as such, without any distinction, in the local specialized literature;

- Presentation of some defining, clarifying aspects of the performance of the museum organizations, of its evaluation indicators;
- Emphasis on the possibilities of understanding the activities specific to the museum Management and the methods of evaluation of the performance Management within the museum organizations, starting from the vision, mission and objectives of each museum;
- The investigation substantiation, design, organization and development, which is entirely one's own contribution; the interpretation and proposals drawn up within the analysis of the respondents' opinions.

Apart from being just a building, apart from its heritage, apart from its management, *the museum shows us, reveals us who we are, it gives us measure ...* The *object* fragility and the emotion of the *things done properly* forces us *to take care*, build strategies, be better, be performers!

The *joy of knowledge* helped us elaborate some final considerations, in the belief that the Museum must be identified by the society as an education center:

1. The museum must be analyzed as an organization. Defining the museum as an organization renders it its identity, evolution and complexity, much more than the “static” *institution* does.
2. The paradigms of the museums have changed in time, becoming *an open space for heritage communication*; from the “privilege” of visiting a museum to the “satisfaction of the public’s needs”.
3. The museums, as public institutions, are resistant to change – nothing happens, but they don’t meet their objectives, but they have the “monopoly” in a certain area (both as a geographical space and as a patrimonial representation).
4. The museum does not aim to obtain financial profit, but to meet the social expectations.
5. The performance in museums can also be defined as *an excellence result, not only as an achievement of some performance indicators showing its functionality at some point in time, to a particular standard*. Therefore, we propose for museums the necessity to fulfill the requirements of the fourth E – excellence.
6. A performing museum is:
  - a. *An organization which studies* and proposes (through awareness and professionalism), assumes and meets quality objectives, additional standards apart from the functional ones (sufficient for survival), established on the basis of knowledge and learning.
  - b. *An organization which (re)positions itself* on the touristic cultural offer market, becoming a space for heritage communication/ edutainment and *defines its vision, mission and strategic objectives* by keeping track of the common interest of the society.

- c. An organization which orientates itself towards the 3 Es in executing the “social contract” and which applies a strategic, oriented, concise management with a scientific basic as a method for obtaining its performance.
7. The performing museum is “the organization which permanently studies and develops itself as a means for communicating its heritage adapted to our present times in order to meet the society needs for edutainment to the highest standards, on the basis of a strategic management oriented in this regard.

The implementation of the proposed strategy will change the ASTRA Museum in a museum based on performance management and able to fulfill and accomplish its mission.

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