

# DOCUMENTATION IN MUSEUMS OF IBERO- AMERICA: 2021-2022 SURVEY (Summary)

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ICOM-CIDOC Documentando Museu Iberoamericano  
(DOMINO) Working Group

October 2024 (Data collected during 2021-2022)

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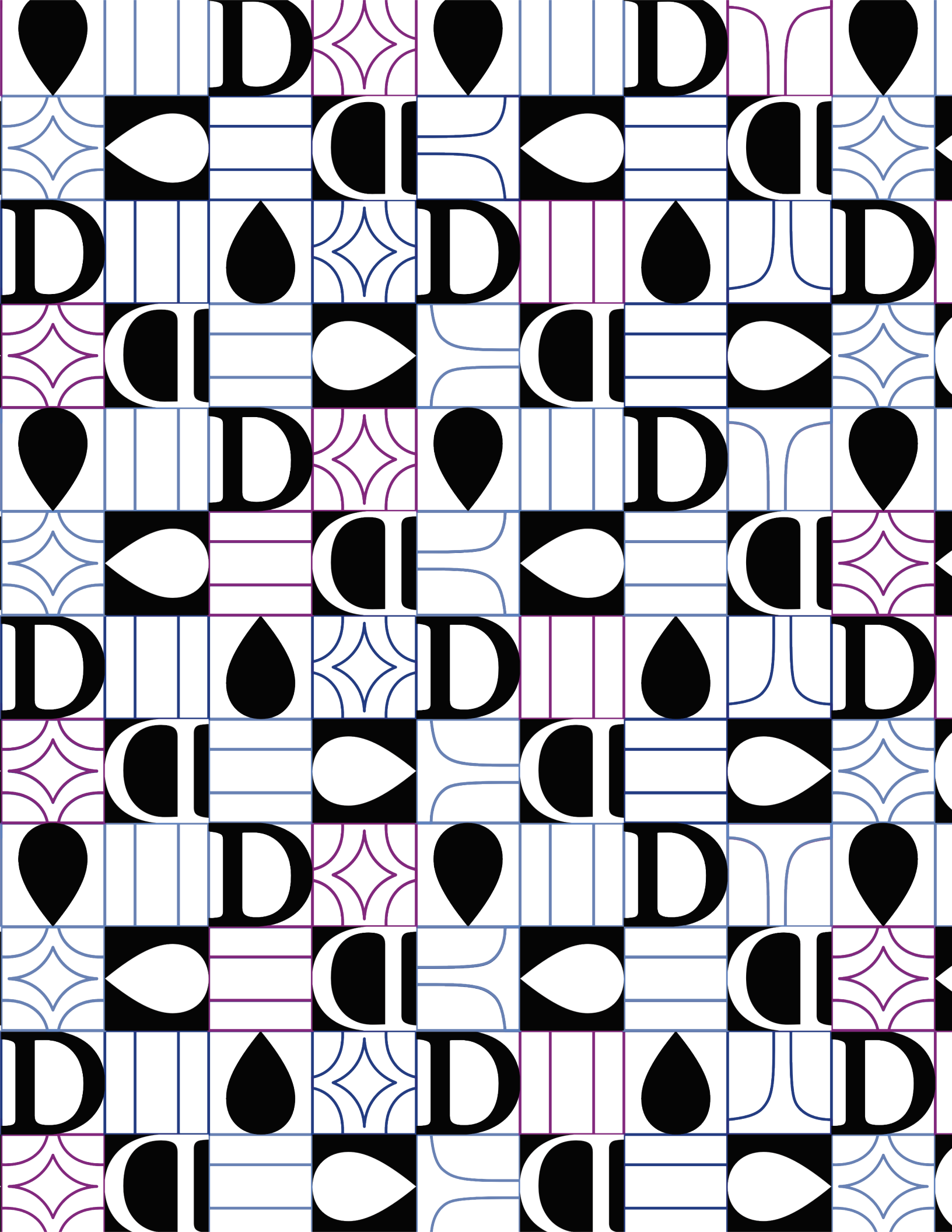
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# EXECUTIVE SUMMARY

The DocumentandO Museu Iberomericano (DOMINO) Working Group, made up of professionals in the museum and heritage field in Ibero-America, considered it important to obtain an initial approximation of the state of museum documentation in the region. To this end, a study was carried out by means of an online survey conducted between 2021 and 2022. Thanks to the active participation of the community, various responses were collected, which have been analyzed and presented graphically in this report.

The results of the 138 surveys received from 13 countries (Argentina, Mexico, Brazil, Chile, Portugal, Ecuador, Guatemala, Paraguay, Uruguay, Spain, Peru, Colombia, and Jamaica) were organized into eight thematic blocks, each of which includes a variable number of questions and answers, accompanied by their respective graphic representation and pertinent observations. The conclusions evaluate the scope of the study, considering the comments of the participants, and analyze the situational problems of museum documentation in the region. The main outcomes of the study are the following:

- **There is a need to internalize documentation work in museums' strategic plans, following CIDOC principles.** The data show that 75% of the museums had allocated staff for documentation tasks, but 54% of the institutions could not determine the time dedicated to this activity.
- **Although inventories in museums are underway, reflecting a good general knowledge of their collections, detailed cataloguing is a key area to strengthen their documentation.** This is based on the fact that 78% of the institutions have inventories of their collections. At the same time, only 12% have complete cataloguing, and 26% have no cataloguing at all.
- **There is not a clear relationship between the appreciation of documentation, the willingness of staff, and the time devoted to it. Institutions that assign low value to documentation, with few staff assigned, naturally dedicate a medium amount of time to this task.**

**The same applies to institutions that assign high value to documentation, with more staff assigned to it.** In the “Low-very low” group, only six institutions have part-time or full-time staff, devoting an average of 50% of their time to documentation. In contrast, the “High-very high” group has 81 participants with assigned staff, but they spend only 57% of their time, despite the importance given to documentation. **However, one explanation for the above result may be because staff are tasked with both documentation activities as well as managing analogue and digital information systems for their inventories and catalogues.** This suggests the need to explore options that reduce this burden without compromising data security.

- **There is an opportunity to strengthen museum documentation and ensure its future sustainability. From the various ways in which museums safeguard collection information, which include both physical and digital strategies, there is a real concern to improve the security of documentation.** The results show that 67% of the museums have both types of strategies, which represents a double workload. In addition, 14% of their collections are still documented outside of digital systems. However, although the need for a comprehensive documentation system is recognized, the idea of archiving as the main safeguarding strategy prevails.
- **Although museums in the region are aware of the digital transformation in their documentation, 56% of them do not update their information online, which leads to obsolete databases limiting their social use. To overcome this challenge, it is necessary not only to digitize objects, but also to organize the information digitally, establishing standards and controlled vocabularies.** This would help to integrate and share data between different memory organizations (libraries, archives and museums), although it also poses challenges in terms of access and information management.
- **Primarily, museums use technologies like having profiles on social networks, and few organizations take advantage of platforms such as those of the Wikimedia Foundation.** More active participation in these could transform access to their collections and how they manage information about their objects.
- **While the path to digitization is inevitable, it is recognized that it requires time, resources, and preparation to organize internal**

**documentation.** The transition towards publishing collection catalogues on the Web is essential, but complicated due to the lack of professionals, appropriate technology solutions, and the cost of sustaining long-term initiatives.

- **There is a desire for cultural heritage standards to be seamless and integrated into institutional policies, and to contribute to the consolidation of heritage data in controlled databases and vocabularies.** Improvement of documentation in the region is obvious; therefore, it is important to identify the areas already covered and those requiring urgent attention.
- **Lesson learned for future surveys: to be more explicit in the definitions and requests of the questions, based on the observations of the participants about the difficulty or ambiguity in understanding some questions of the present survey.**

The report is complemented by a proposal of possible CIDOC strategies to address the problems of museum documentation in Ibero-America. In this sense, CIDOC is working on:

- **Activation of national and local *hubs* or *satellites* that establish working networks. In the first instance, with the organizations participating in the study to support and promote the professionalization of cultural heritage documentation.** The above derives from the fact that, of the 183 entities, 86 showed interest in working jointly with the Committee in the development of guides, and only a few stated using some national or international standards.
- **Assistance for institutions that admitted having a low assessment of their museum collections; this would help them reevaluate their collections and highlight the benefits of implementing standards, such as Object ID, that provide security for their collections.**
- **Promotion of the professionalization of digital security in these museums, disseminating the standards it has developed for interoperability and cultural data management (LIDO, EODEM, CIDOC CRM);** promoting cooperation and information exchange between cultural institutions worldwide. This is based on the need expressed by 64 museums for greater digital security.
- **Provision of guidance to institutions, through Working Groups, in**



**optimizing the benefits of sharing their collections as part of the social responsibility of museums.** This, in response to 20 institutions that expressed a low appreciation for sharing their collections at the international level.

Finally, the report includes tables with participation by country, preferences for the use of social networks, and the 29 questions posed to the participants of the survey.

# DOCUMENTATION IN MUSEUMS OF IBERO-AMERICA:

2021-2022 SURVEY

## INTRODUCTION

In 2021, the DOMINO-CIDOC Working Group initiated various actions to understand the state of museum documentation in the region. In response to one of the fundamental principles of the ICOM Code of Ethics, in which "*Inherent in this public trust is the notion of stewardship that includes rightful ownership, permanence, **documentation**, accessibility, and responsible disposal*" (II principle ETHCOM, 2020). In this sense, it was considered feasible to carry out a survey through a qualitative and quantitative research methodology based on indirect description, which collects and analyses a set of data through closed and open questions from a sample of participants representative of a community (García et al., 1993). Thus, a survey was developed to allow the working group to outline data on how many museums deal with documentation on a daily basis and in what way, focusing on issues like their relationship with standards, information technologies, social networks, and the notions of inventory and cataloguing.

Once the survey was formalized, the first response was received on August 31, 2021, and the final on March 3, 2022, the moment the information gathering process was declared closed. During this period, 138 (100%) responses to the survey were received, of which 101 belonged to Spanish-speaking countries and 37 to Portuguese, mainly (**Fig. 1**).

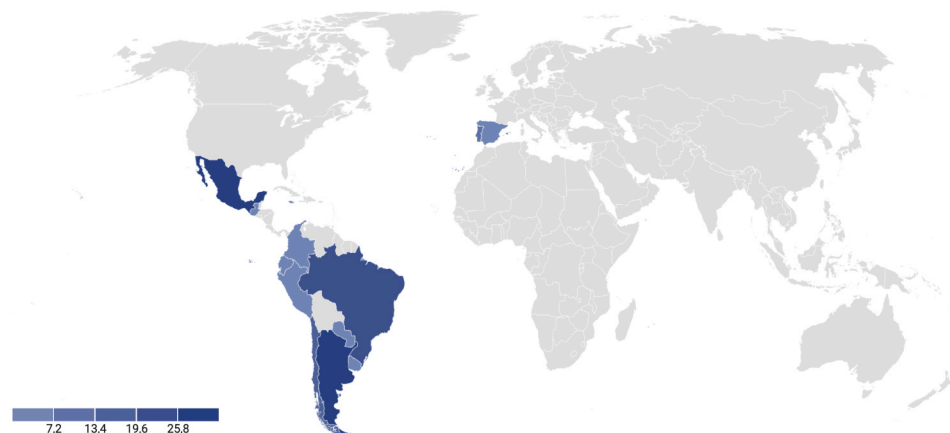
The distribution of museums, according to the number of survey responses per country, is as follows (Argentina, Mexico, Brazil, Chile, Portugal, Ecuador, Guatemala, Paraguay, Uruguay, Spain, Peru, Colombia and Jamaica):



FIG. 1. LANGUAGE OF RESPONSES

● Spanish	73.2% (101)
● Portuguese	26.8% (37)

MAP. GEOGRAPHICAL DISTRIBUTION OF PARTICIPATING MUSEUMS



The number of responses for each country can be reviewed in detail in **Annex 1. Table A1.**

The working group for this survey, from planning to implementation and publication, involved: Ana Álvarez, Ana Vivarés, César Huiza, Juliana Alves, Juliana Monteiro, Marcela Covarrubias, Pedro Ángeles, Paula Casajús, Trilce Navarrete.

## SURVEY METHODOLOGY

In the survey, the DOMINO-CIDOC working group proposed general questions, although the content focused on problems related to museum documentation. In order to cater to the main languages of the region, it was decided to offer the survey in two languages, Spanish and Portuguese. It was disseminated online through contact with national ICOM offices, as well as the group's own personal contacts. The survey was divided into the following sections:

- 1.** The first, *About you*, makes visible the data of the person answering the survey and what position they hold in their organization, as well as whether they are interested in being connected with CIDOC in the future, to work on issues related to documentation.
- 2.** In the section *About your museum*, the general data of each organization is requested, as well as their social media profiles and collaboration in projects generated by the Wikimedia Foundation. In this section, special attention was paid to differentiate the number of staff working in the museum from those who are in charge of specific tasks related to documentation, as well as the time they dedicate to this work.
- 3.** The following section, *About the public*, enquired about visitor numbers of the organization surveyed.
- 4.** The section *About your collection* is one of the most strategic, as it requests information regarding the collections in each museum, whether they have an inventory and in what format they maintain it, whether they have a catalogue and to what extent it covers the collection, in what format they maintain it, as well as how secure they think the museum's information is.
- 5.** Equally important is the section *About the level of documentation of the collection*, which asks a) what standards guide the documentation work, b) How many objects in your collection present a basic identification, c) if the organization has a Web portal and how much of their collections is available online, d) for data regarding how often this information is updated and finally, e) what percentage of their collection has a registration record based on the *Object ID* standard.

**6.** In the section *About museum professional associations*, we asked questions about the cultural heritage organizations the respondents are familiar with; specifically, if there is anyone who handles issues related to intellectual property rights, if they have attended events related to documentation issues and professionals, and which institutions they have as their model or reference.

**7.** In the last section, three questions are asked to close the survey regarding the importance documentation has within their organization, if they have objects valued within the sphere of world heritage, and whether there is interest in each museum to share their collections and objects globally.

The survey questionnaire is included in **Annex 2**.

## CONCLUSION

There are many readings to be made regarding the survey. First, it is necessary to take into consideration the feedback for several of the research questions, which revealed that they were abstract or difficult to understand. One example was the question “*Does my museum have valuable and important objects that are considered World Heritage?*”, where it was not clear whether the question was about the administrative procedure followed by governments for the recognition of works or about the symbolic values (historical, aesthetic, formal, etc.) that the works have for the museums. In addition to understanding World Heritage as a topic with parameters that are in flux, we must also consider that what today has local or regional value, may later expand. Although some questions may have been ambiguous, we find that we still have a long way to go to improve the methods that allow us to learn about documentation in our region. This leads us to consider, in a future study, being more explicit in our definitions and requests in our questions.

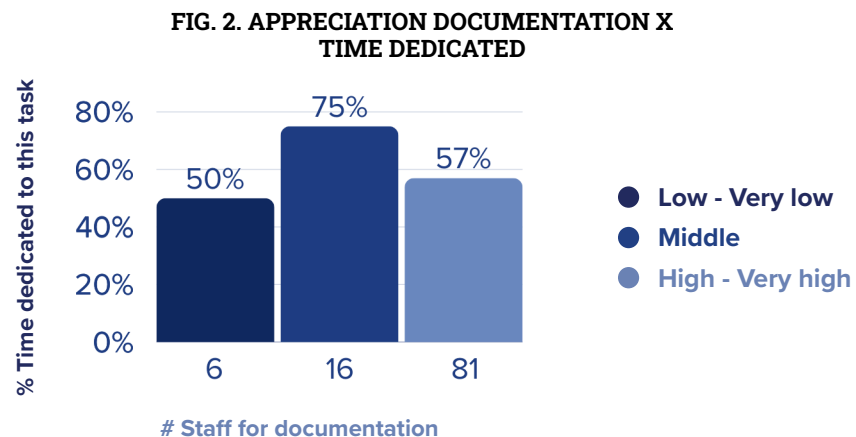
Regarding the availability of staff to carry out documentation tasks in the museum, only 75% of the responding institutions employ temporary or permanent staff to carry out these activities. In relation to the above, 54% of those institutions could not establish any amount of hours dedicated to documentation tasks. This provides an opportunity for staff assigned to documentation work to request that their institutions consider them core and strategic activities, invoking *CIDOC's Statement of Principles of Museum Documentation*.

In relation to the degree of knowledge about the collections of the institutions through documentation, it was positively reflected that most respondents (78%) had simplified lists, which covered more than 80% of their inventories of their collections, showing a high degree of coverage. However, with respect to progress in cataloguing, there is a lower degree of coverage, since only 12% of those surveyed mentioned having a complete catalogue of their collections and 26% of the participants said they had no cataloguing of their collections at all. In general terms, a greater progress in inventory work is expressed, and that work seems to have a general/horizontal/shallow collection knowledge. It also expresses smaller progress in cataloguing work, which by its nature seeks a detailed/vertical/deep knowledge of collections. Therefore, although the responses reflect that the inventory

## CONCLUSION

is very advanced, cataloguing work is an important area of opportunity for the promotion of the culture of documentation.

On the other hand, we were able to highlight the evident relationship between the appreciation of documentation practice with respect to the availability of staff, and the percentage of time dedicated to this task. Of the respondents that chose “Low-very low” for documentation value, only six mention that their institutions have part-time or full-time staff for documentation activities, so they have only an average of 50% of time dedicated to this activity. However, of the respondents that selected a “High-very high” value, only 81 participants stated that their institutions have part-time or full-time staff for documentation activities and, contrary to the high value expressed, only had an average of 57% of time dedicated to documentation (**Fig. 2**).

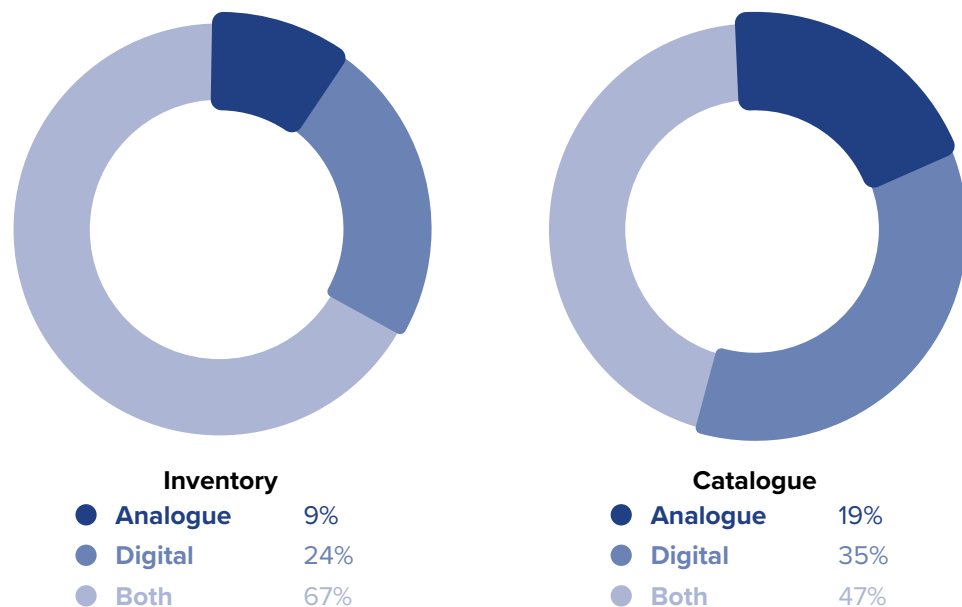


Regarding measures for safeguarding collection information and how this could be improved, the answers were varied, both regarding analogue and digital measures. This range of responses would suggest that if there is recognition that the documentation is at risk and needs to be better safeguarded, the very idea of documentation as an organized practice in the museum is regarded as vital; given archiving and filing are considered the most obvious way to work for the safeguarding of documentation with little mention of backups, another opportunity can be identified to work on the importance of museum documentation and its vitality in the future.

## CONCLUSION

Although the impact of “digital culture”<sup>1</sup>, has affected the museums of Ibero-America, the implementation of digital processes in museums may be less impactful. For example, considering that the Web plays a paramount role, there are few collections online that are sufficiently documented or updated. This creates static databases, without social use, a fact that is reflected in 56% of the participants stating that they “never” or “almost never” update their information online. It is therefore necessary to include exchange, evaluation, usage and life processes in museum data. It is important for the sector to understand that digital transformation requires not only digitizing objects but also organizing their information computationally, formalizing relationships and links that lead to the formation of controlled vocabularies that are both access keys and information convergence processes. These processes dilute, on one hand, the boundaries between memory organizations (libraries, archives, and museums) but, on the other, they generate tensions regarding where, who, and when information will be displayed, whether broad or restricted.

**FIG. 3. INVENTORY FORMAT VS CATALOGUE FORMAT**



<sup>1</sup> Societies in which digital technologies decisively shape the dominant forms of both information, communication and knowledge, as well as those of research, production, organization and administration (Hockey, 2004).

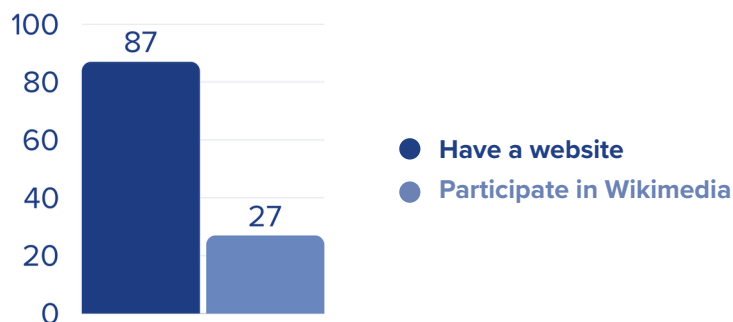


## CONCLUSION

Regarding the use of formats for the storage and safeguarding of documentation, the institutions which answered the survey are not able to allocate a specific number of hours per week to carry out documentation work due to the multiple tasks they perform. They have a double workload, as they feed two information systems (analogue and digital) in their inventories and catalogues as security measures (**Fig. 3**). This leads us to consider the possibility of exploring other options to lessen this burden, while maintaining the necessary data backup.

While it is clear from the results of this survey that the primary level of information technology use is in the access and use of social media, few organizations are aware that active participation in methods offered by organizations such as the Wikimedia Foundation can alter not only access to their collections but also the way information about their objects can be built (**Fig. 4**).

**FIG. 4. HAVE A WEBSITE & PARTICIPATE IN WIKIMEDIA**



The hybridization of documentation is a genuine problem as it begs the question: if everything is digitized and processes are completely formalized online, what will be the cost of maintenance and digital preservation in the long term? Today, inventories and catalogues are both kept in analogue and digital forms, but likely the digital option will prevail. How will institutions work with data in dissimilar formats? Probably the path for museums to move towards digital collections will take time, and this process could create new types of internal documentation centers. At the same time, experiences over the pandemic could suggest that the online publication of collections is a necessary task. While support within institutions will vary, there are numerous ways this can

## CONCLUSION

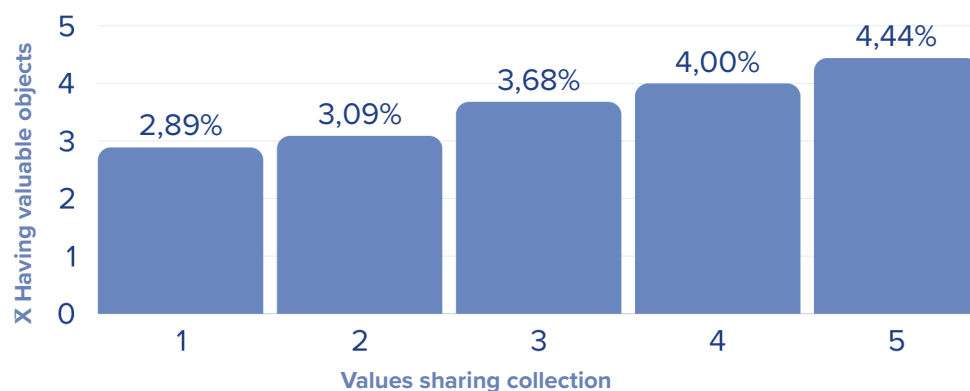
be accomplished with trained professionals and adequate technical solutions. Since publishing collections online requires standards, it is important museums adopt cultural heritage standards, and change their institutional processes as well as policies of national coverage.. Standards help to better shape heritage data; they are applied in database structures, cataloguing rules. For example, controlled vocabularies are standards that are capable of addressing our languages and their regional variants. The decisions as to how best to use the digital realm for this crucial work are still in flux, but these discussions must be pragmatic. We must refine the idea of building our own documentation systems with well-grounded notions that will help display the region's heritage in the future, with the required quality and the appropriate depth.

In simple terms, documentation in our region must be attended to more and better by museums; hopefully, there will be enough data to define which aspects are sufficiently covered and which require urgent attention to address them by the DOMINO Working Group and CIDOC.

## TOWARDS A FUTURE STRATEGY OF CIDOC FOR IBERO-AMERICAN MUSEUMS

This section reviews aspects of the survey where CIDOC may collaborate and guide the participation of museums that are dealing with issues arising from documentation of cultural heritage. For example, the institutions that have averages of (4.44) and (4.00) consider: having valuable objects in their collections and of World Heritage. Are associated with institutions that have rates (4) and (5) respectively; interested in sharing their collection globally. Therefore, the museums that have valuable objects, they want to share them (**Fig. 5**). CIDOC could guide the museums' interest in sharing their collections through information technology tools. Which presents new challenges in the dynamics of museum processes<sup>2</sup> and documentation itself. In a future survey, questions will be phrased to differentiate between the opinions of an institution's management and the person answering the survey.

**FIG. 5. HAVING VALUABLE OBJECTS X VALUES SHARING THEIR COLLECTION**



Regarding the evaluation of how institutions are internalizing the concepts standards, it should be noted that a core objective of documentation is to establish documentation systems that reflect a commitment to accessing their collections. The Web is a democratizing tool that enables this objective. However, the implementation of

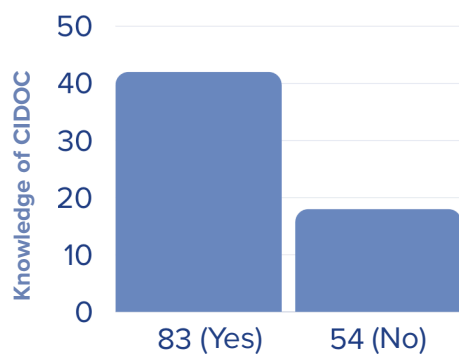
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<sup>2</sup> As it pertains to collecting [object/data], researching [access to information], exhibitions [disseminating] (Borja, 2018).

documentation standards<sup>3</sup> should be considered as a requirement to move collections to the Web in an effective way.

The question about following documentation standards received a lack of participation and ambiguous responses. We found that 61% (83 participants) answered “Yes” to carrying out their documentation with the adoption of at least one national and/or international standard, while 39% (54 participants) answered “No” to the adoption of any standard or guide. Of the 83 participants who use any standard(s) for documentation, only 42 expressed knowledge of CIDOC. This represents a challenge for the Committee to contact these institutions, to guide and support the professionalization of documentation (**Fig. 6**).

**FIG. 6. USE ANY STANDARD X  
KNOWLEDGE OF CIDOC**



¿Do you follow any guidelines, norms or standards?

Another inference that emerged was related to increasing the applicability of documentation standards, such as the Object ID standard, a tool that enables a non-specialist to begin standardized documentation. This allows data related to collections to be easily retrieved in the event of loss or theft (UNESCO, 2006).

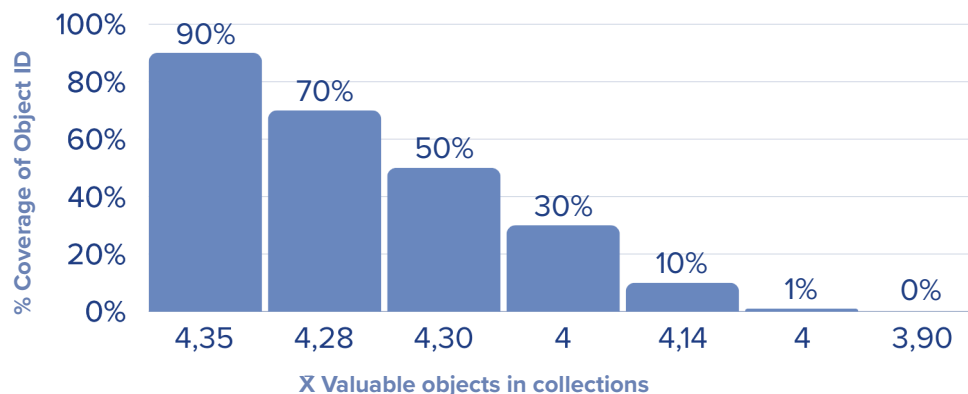
Museums that have adopted the Object ID standard for object description to various extents (90%, 70% and 50%), have an average value of (4.35, 4.28 and 4.30 respectively), on the fact of having objects considered valuable objects in the collection. At the other extreme, museums that have very low adoption or do not implement the Object ID standard (1%,

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<sup>3</sup> Such as controlled vocabularies, metadata models, and cataloguing rules (Alcántara, 2023).

0%), have a mean value (4 and 3.90) less than the previous group, with respect to having valuable objects in their collections (**Fig. 7**).

**FIG. 7. COVERAGE OF OBJECT ID X VALUABLE OBJECTS**



In this sense we can see that museums applying the Object ID standard are motivated to consider the value of their objects. It is therefore possible for CIDOC to potentially guide those museums who do not consider having valuable objects to reevaluate their collections. Both raise awareness of the benefits of security over heritage in their custody.

Similarly, museums with a high percentage catalogued objects (90%, 70% and 50%) consider that they possess valuable World Heritage objects, with mean values of 4.36, 4.78, and 4.11 respectively. On the other hand, museums with low coverage, or do not catalog their collections (10% and 0%), consider that they have valuable objects in their collections to a lesser extent, with mean values of 3.64 and 3.47. This may indicate that museums that document their collections are aware they are custodians of valuable cultural heritage, although we should consider the resources to conduct this task (**Fig. 8**).

With respect to the group of 96 participants who considered “improving the way they safeguard” their information, 63 stated that they would be “interested in working together with CIDOC” to develop working guides. This leads to potential action for the Committee professionalizing museum documentation through the creation of regional hubs or satellites which create networks among organizations (**Fig. 9**).

FIG. 8. COVERAGE OF CATALOGUE X  
VALUABLE OBJECTS

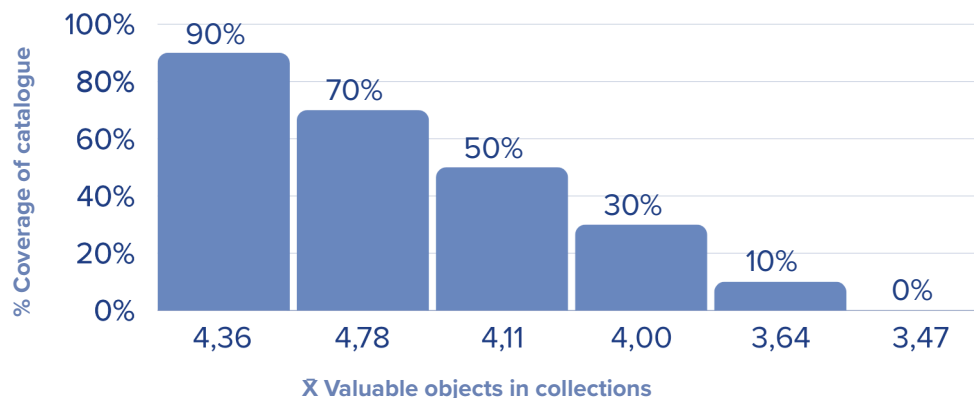
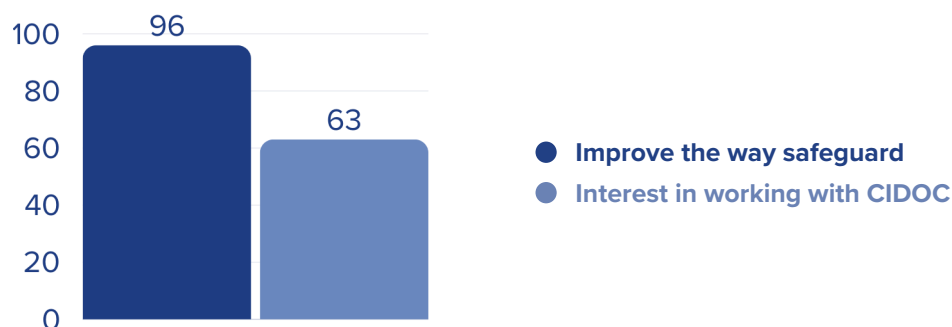
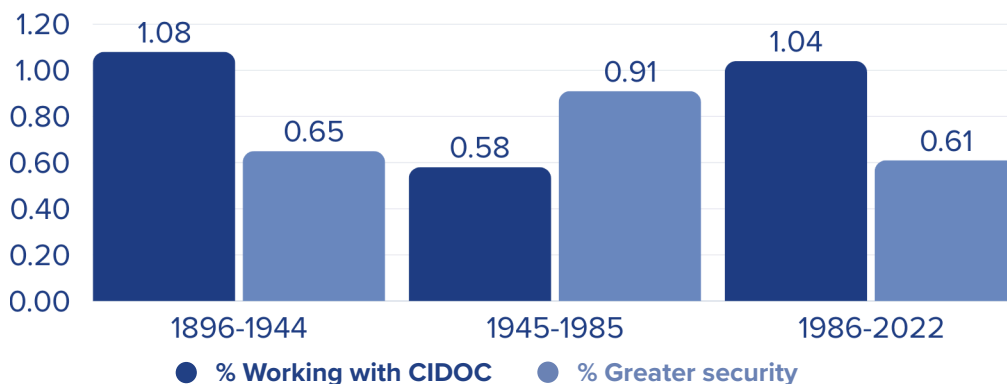


FIG. 9. IMPROVE THE PROTECTION OF YOUR  
INFORMATION X INTERESTED IN WORKING  
WITH CIDOC



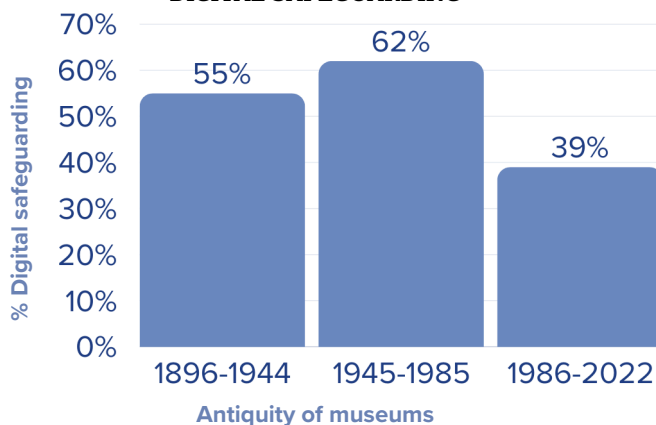
On the other hand, in relation to the need for better safeguarding of their collections, by grouping the participating museums according to year of foundation or operation, we can see that the “1986-2022” group (recent museums) expressed “no” need for “Greater security”, or 0.61%. This may be because some could be housed in sufficiently safe spaces. Strangely, however, the group of “1896-1944” (historical museums) also expressed “no” need for “Increased security”, or 0.65%. This is different from what was expressed by the group “1945-1985”, who do express the need for “Increased security”, or a total of 0.91%. All three groups are interested in working with CIDOC (Fig. 10).

**FIG. 10. INTERESTED IN WORKING WITH CIDOC  
X REQUIRE SECURITY**



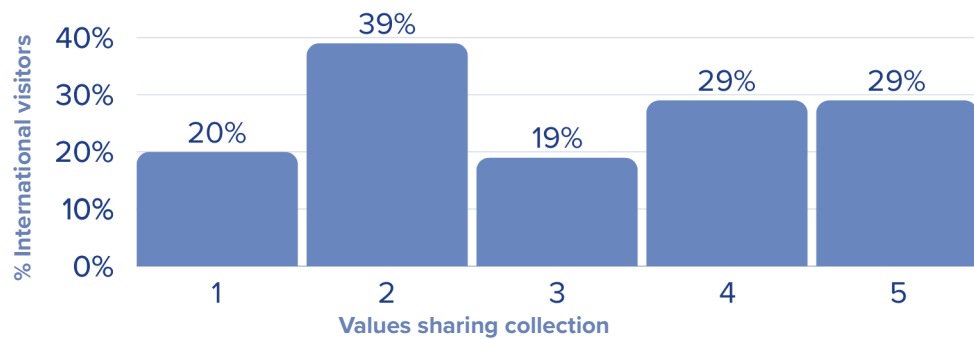
Based on the previous results, we were able to determine the digital safeguarding requirements of the participants. The “1986-2022” group mentioned “no” need for more digital safeguarding, or an index of 39%, possibly, because they already have satisfactory digital safekeeping. On the other hand, the “1896-1944” group also mentioned “no” need for more digital safekeeping, with an index of 55%. This may be because most of them have not begun the digitization process for their physical collections. The “1945-1985” group mentioned “yes” to require greater digital safekeeping, with an index of 62%. Therefore, CIDOC can contribute to professionalizing the digital security of museum collections (**Fig. 11**).

**FIG. 11. ANTIQUITY OF MUSEUMS X  
DIGITAL SAFEGUARDING**



Finally, regarding the relationship between the questions where participants value sharing their collections (1 - 5) and the number of international visitors, the highest rate of international visitors, 39%, is associated with a low valuation index (2). In this sense, the interest of museums in sharing their collections internationally is not associated with or directly dependent on international visits (**Fig. 12**). Therefore, CIDOC could promote the benefits of sharing their collections, as well as guide those institutions in their participation in Working Groups that may address their particular problems.

**FIG. 12. INTERNATIONAL VISITORS X  
VALUES SHARING THEIR COLLECTION**





# APPENDICES

## Appendix 1. Response numbers

**Table A1. Number of responses by country**

Country	Answers
Argentina	32
Mexico	32
Brazil	25
Chile	17
Portugal	10
Ecuador	4
Guatemala	4
Paraguay	4
Uruguay	4
Spain	2
Peru	2
Colombia	1
Jamaica	1

**Table A2. Number of museums with social media profiles in use**

Social media	Answers
Facebook	113
Instagram	94
Twitter (now X)	45
Youtube	14
TikTok	9
LinkedIn	2
SnapChat	1
Spotify	1
Kwai	1
Issuu	1
Flickr	1
Tumblr	1

## Appendix 2. Survey questions

1. What is your function or position within your museum?

2. If you are interested in keeping in touch with DOMINO to be part of this network, please leave us your email address.

3. Name of the museum

4. Address of the museum (include country, region and city)

5. Opening year of the museum

6. What is the URL of your museum website?

7. Does your museum have social media profiles?

8. If yes, which social media profiles does your museum manage?

9. Does your museum have a presence in Wikimedia projects?

10a. Number of staff, paid and full-time volunteers

10b. Is there one or more designated worker(s) who are exclusively in charge of collections documentation and registration?

10c. If your answer was partially, how many hours per week do you spend on this work?

11. In a pre-pandemic context (2019), how many months of the year is your museum open to the public?

12. Do museum visits operate on an appointment basis?

13. Estimated percentage of national and international visitors

14. Does the museum have its own collection?

15a. What percentage of the collection is inventoried/catalogued with a simplified list?

15b. In what format is the inventory?

16a. What percentage of the collection is catalogued with a detailed description?

16b. In what format is the catalogue?

17a. Do you consider that the collection information in your museum is sufficiently safe and secure?

17b. If yes, how is it safeguarded?

17c. Would you improve its safekeeping? How?

18a. Do you follow any guidelines, norms or standards to inform your decisions and work regarding documentation?

18b. If yes, which one, do you consider it adequate?

18c. Would you be interested in working as a team with CIDOC to develop networking guidelines?

19. What percentage of your collection has basic information to identify the object? [0,1%-20%]

19. What percentage of your collection has basic information to identify the object? [21%-40%]

19. What percentage of your collection has basic information to identify the object? [41%-60%]

19. What percentage of your collection has basic information to identify the object? [61%-80%]

19. What percentage of your collection has basic information to identify the object? [81%-99.9%]

19. What percentage of your collection has basic information to identify the object? [100%]

20a. Is your collection available on any portal (inter-institutional, national or international)?

20b. If yes, which one (URL)?

21. What percentage of your collection is available on the Internet?

22. How often is the information in the online collection updated?

23. What percentage of your collection has Object ID records?

23. Which of the following international organizations are you familiar with?

24a. Do you attend or have you attended professional meetings between museums related to documentation?

24b. If yes, which one(s)?

25. Which institutions are professional references for your museum?

26. In your museum is there someone who manages the Intellectual Property Rights (IPR) of online content (author's rights and copyright)?

27. My museum values the work of documentation.

28. My museum has valuable and important objects that are part of the World Heritage

29. My museum values sharing the collection globally.

Additional comments

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