

**Consulting and Support for the further development of documenta und  
Museum Fridericianum gGmbH**

**Summarizing Final Report**

**METRUM Managementberatung GmbH**

Munich, December 15th, 2023

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## **A) Management Summary**

METRUM was commissioned by documenta und Museum Fridericianum gGmbH to perform an Organizational Review. The basis for the commission was a resolution by the Shareholders' Assembly in July 2022. The aim of the Organizational Review is to develop analyses in all identified topic areas and, where necessary, make recommendations on how improvements can be achieved.

The project was triggered by the anti-Semitism incidents at documenta fifteen in 2022 and the inadequate handling of these – suitable recommendations are intended to ensure that discrimination of all kinds is avoided within gGmbH and in particular at the documenta exhibition in future. Artistic freedom shall be fully safeguarded by means of a suitable demarcation of responsibilities. However, the Organizational Review was not exclusively focused on these issues, but is also aimed at making the organization as a whole more crisis-proof and resilient. This review therefore contains recommendations for organizational improvements in many areas, which on a general scale means a comprehensive optimization and professionalization of the gGmbH's structures and processes.

Business planning was not featured as part of the Organizational Review, but coordination with the financial plans prepared by the gGmbH at around the same time was ensured by including initial estimates of the financial impact of the recommendations with a direct budget impact into the Organizational Review.

The recommendations of the Organizational Review were developed in a process between April and October 2023. The Steering Committee – comprised of the gGmbH's General Manager and representatives of the two shareholders – met four times during this period.

All in all the Situation Analysis reveals a highly renowned and successful institution with a unique and clearly definable character, but one that is highly prone to error due to its at times rather informal and ambiguous structures and dysfunctions in governance – something that has become particularly evident in the last two editions of the documenta exhibition.

All in all, the Recommendations draw a picture of an institution that is well aware of its unique selling points and strengths, that clearly wishes to preserve these and protect them even better in the future, and that can substantially reduce its proneness to error and frictions through a "professionalization drive" in order to become significantly more crisis-resilient and efficient in the future.

All 22 recommendations from Chapter E are presented here in tabular form.

|                          | Recommendation  | Priority     |
|--------------------------|---|--------------|
| Governance               | 1 Retention of the Finding Committee with slight improvements   | Medium       |
|                          | 2 Two Codes of Conduct on an equal footing  | Very high    |
|                          | 3 Optimization of the Supervisory Board and establishment of a Scientific Advisory Board (incl. amendment of Articles of Association) | Very high    |
|                          | 4 Clarification of the tasks of Management and Artistic Direction (incl. new Rules of Procedure)                                      | Very high    |
| Organizational Structure | 5 New Organizational Chart with four management levels  | Very high    |
|                          | 6 Earlier recruitment of strategically relevant positions at the third management level   | Medium       |
|                          | 7 Differentiation between disciplinary personnel management and subject-matter related personnel management                           | High         |
|                          | 8 New Organizational Learning and Development department  | Medium       |
|                          | 9 External Ombudsman's Office   | High         |
|                          | 10 Pooling of resources in Education/Mediation and Communication, Public Relations and Marketing                                      | Medium       |
|                          | 11 Comparability in the salary structure  | High         |
|                          | 12 Permanent employment of more staff responsible for core tasks  | High         |
|                          | 13 Sufficient personnel resources in strategically and substantively relevant areas   | <i>diff.</i> |
| Process Organization     | 14 Optimization of core processes   | High         |
|                          | 15 Introduction of a Risk Management System   | High         |
|                          | 16 Introduction of a Management Board   | Very high    |
|                          | 17 Introduction of various approaches to "soft" internal communication  | High         |
|                          | 18 Performing a Process/IT Application Analysis of the entire application landscape   | Medium       |
|                          | 19 Introduction of a Digital Knowledge Management and Feedback Tool   | High         |
|                          | 20 Introduction of a Digital Task Manager   | Medium       |
|                          | 21 Examination of the introduction of a flexible multi-year working time model for ca. eight lead positions                           | High         |
|                          | 22 Leave key make-or-buy decisions unchanged  | Medium       |

Figure 1: Overview of all 22 Recommendations of the Organizational Review

The five recommendations rated by METRUM as having very high priority are described in greater detail in this Management Summary:

- The implementation of **two Codes of Conduct on an equal footing**: one to be developed promptly by the gGmbH and a second Code of Conduct for the exhibition to be formulated anew every five years for the upcoming edition. In order to make the avoidance of discrimination a non-negotiable requirement, the Code of Conduct for the exhibition must be suitable for ensuring the protection of human dignity. However, in order to ensure protection of artistic freedom in full, the second Code of Conduct will always be formulated anew by the respective Artistic Direction for each edition of the documenta exhibition. This also includes the Artistic Direction's freedom to explain what exactly the protection of human dignity implies within this context. This Code of Conduct for the exhibition is next discussed with the gGmbH and then, on the basis of the final decision of the Artistic

Direction in terms of content, brought to the attention of the Supervisory Board.

In accordance with Germany's constitution (Grundgesetz), this structured approach is intended to take into account a proper balance between artistic freedom on the one hand and the duty of public cultural administration to avoid discrimination on the other, similarly to focus on the early recognition of potential tensions, timely communication and informal cooperation in the sense of adequate constitutional interpretation by means of principles of practical concordance ["praktische Konkordanz" being a key tenet to interpreting the German Grundgesetz]. Furthermore, this is the best way to reflect the project character of the documenta exhibition, which as an overall organization must also reinvent and reposition itself to a certain extent with each exhibition.

In METRUM's opinion, this structured dialogical approach plays a crucial role in the question of whether, and how, Codes of Conduct can interact with curatorial content and in the same breath protect and preserve artistic freedom. All other codes of conduct of cultural institutions in Germany presently known to METRUM fail to address this ultimate question in the vast majority of cases and for most part are limited to the avoidance of discrimination in internal interpersonal cooperation and do not extend to curatorial topics. However, this alone would not be enough for the documenta exhibition, as the debates during documenta fifteen have shown.

- Governance should be improved by emphasizing the **Supervisory Board as the main supervising body of the gGmbH**, further by reducing the size of the Supervisory Board, as well as giving the Federal Government voting rights on the Supervisory Board and introducing a Scientific Advisory Board "Wissenschaftlicher Beirat", whose chair is represented on the Supervisory Board with voting rights. In this way, the opportunities for improvement in governance are firmly realized and the Federal Government is appropriately represented and integrated into documenta as a world leading international art exhibition and outstanding cultural brand without having to adjust the shareholder structure of the gGmbH.
- **A clear and binding division of responsibilities between the CEO and Artistic Direction of the exhibition**, which will be set out in new Rules of Procedure. The division of responsibilities is based upon extensive periods in the past when this eventually trusted relationship worked well, but spells it out in a binding manner, thereby eliminating the ambiguities and sometimes contradictions in the various existing documents. This also clarifies responsibilities in the event of crisis and opens up the possibility for the gGmbH to distance itself from possible artistic content considered problematic, without interfering with the art

itself. In this way, the protection of artistic freedom is ultimately protected, yet strengthened – without rendering the gGmbH incapable of acting.

- A **new and decisive organizational chart for the gGmbH** that can be used over the course of documenta's archetypical five-year cycle by "activating" and then "deactivating" many positions. This remedies the vital shortcoming that there is currently no valid Organizational Chart. Responsibilities and tasks in future are described without contradiction, clearly assigned and delineated. The basic structure remains constant over the entire five-year cycle and is therefore easy to understand for everyone involved. In addition, the new Organizational Chart includes an "Organizational Learning and Development" department, which is responsible for topics such as intercultural communication and anti-discrimination, as well as improvements in the areas of public relations, education and organizational development. For the first two levels of this Organizational Chart, see Figure 2 below.
- The clear **definition of a "Management Board"** consisting of the General Manager, the Artistic Direction and the members of the second management level, who in this role permanently support the leadership and thus place the operational management of the gGmbH on a visibly broader and considerably more sustainable basis. This also ensures close communication and mutual cooperation and consultation between artistic, organizational and financial departments. This recommendation is in response to analyses that the cooperation between the second management level and the General Manager has functioned insufficiently in the past.

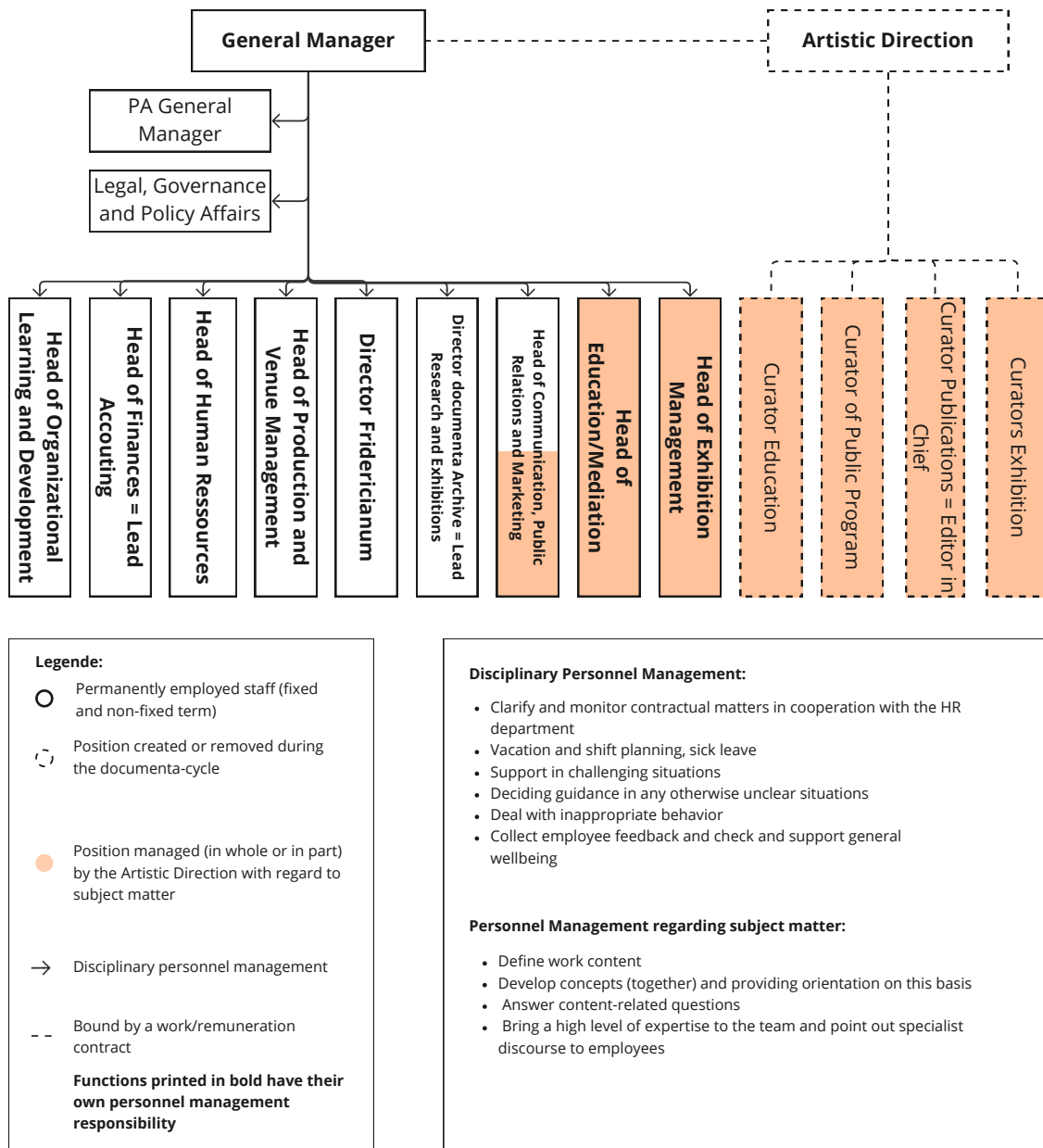


Figure 2: Diagram of the first two management levels of the recommended future Organizational Chart. Recommendations 7 and 8 are already included in this Organizational Chart. The Organizational Chart designed with METRUM also includes the third level, the team leaders ("Leads"), which is staffed partly by permanent and partly by temporary personnel. The fourth management level will be so-named coordinators, which will be staffed exclusively by temporary employees. No draft Organizational Chart was drawn up for this level over the course of the Organizational Review though, as it will have to be staffed flexibly and with a view to the specific exhibition planning.

## **B) Project Goal**

The aim of the Organizational Review (hereinafter referred to as OR) was to examine all key aspects of documenta und Museum Fridericianum gGmbH (hereinafter referred to as gGmbH) and, where necessary, to make recommendations on how improvements can be achieved.

This comprehensive, critical review of all organizational issues was initiated by the shareholders of the gGmbH in light of the anti-Semitism incidents at documenta fifteen and the heavily debated and criticized handling of these incidents. Appropriate recommendations should ensure that discrimination of all kinds is avoided in future at the gGmbH and in particular at the documenta exhibition, and that artistic freedom is nevertheless fully safeguarded through an appropriate assignment of responsibilities.

However, the task of the OR was not exclusively to deal with the topics of discrimination prevention, crisis management and crisis communication, but to explicitly open its remit to practically all organizational improvement potentials – including those which have not yet been publicly discussed. There are three main reasons for this broad-based approach:

- The final report of the expert advisory panel of documenta fifteen (hereinafter referred to as the expert advisory report) spells out in many places that problems lay not only in the actions of individuals, but also in fundamental organizational structures. Focusing solely on a process to prevent anti-Semitism and improve crisis communication would not solve or remedy these fundamental problems and challenges to the documenta organization.
- The gGmbH is a highly successful cultural institution that has grown immensely in reach and importance but also structurally over time, but in METRUM's opinion one that has so far been strongly marked by ad hoc solutions and reaping its success thanks to the enormous personal commitment of its employees. In such situations, METRUM's experience shows that at a certain point, an organizational overview is necessary in order to critically review the structures and behaviors that have evolved and thus maintain the high level of motivation in the future.
- With the new General Manager taking office in May 2023 and in view of the time gap to the next documenta exhibition in 2027, now is exactly the right time to implement fundamental organizational improvements before the day-to-day business and intense preparations for the 16th edition of the exhibition tie up the gGmbH's capacities again.



Many of the recommendations for improvement developed with this broad and extensive approach directly or indirectly address the two triggers for the OR and will make a decisive contribution to preventing anti-Semitism and all other types of discrimination as well as to improving crisis management and crisis communication. However, they will also ensure the gGmbH is much better prepared to deal with any non-foreseeable but expectable critical challenges than it would have been in the absence of these improvements.

The goal of the OR described above was differentiated in such ways that the recommendations can be assigned to the three typical areas of an OR:

1. Recommendations for **Improving Governance**, in general terms understood as the rules, work processes, tasks and competencies of supervisory and decision-making bodies over and above the General or Executive Management, and as the regulation of their cooperation with the operational General or Executive management.
2. Recommendations for **Improving the Organizational Structure**, **generally** understood as the division of the organization into areas and departments, the assignment of tasks, competencies and responsibilities to these individual areas and the appropriate allocation of resources to these.
3. Recommendations for **Improving Process Organization**, understood as the work processes by which the various areas and departments within an organization work together and communicate with one another.

It is a fundamental belief of METRUM that organizational improvements can only be developed in a target-oriented manner if a proper understanding of the strategic goals and aims of the organization can be incorporated into these improvements in the coming years ("structure follows strategy"). It was therefore necessary to comprehend these strategic goals and discuss them with the gGmbH and its shareholders. However, it shall be emphasized that it was not the aim of the OR to make recommendations for adjusting the strategic goals.

Adjustments to the organization are often accompanied by adjustments to the financial situation, be it by reassigning internal budgets or necessitating additional funds to improve the organization as a whole. METRUM has estimated the resulting funding requirements in its recommendations so as to provide an indication in this area. However, it was not the aim of the OR to produce a comprehensive business plan for the gGmbH, either for the individual years or for the 5-year plan for the exhibition on total scale. This business plan will be developed independently and in parallel by the gGmbH and will include the impact of the OR, but will also take into account other plans

and developments not caused by the OR. It has been agreed with the gGmbH that this business plan will clearly show the contributions made by the OR, adjusted by the specific procedures of the gGmbH but within the framework of the estimates set out here by METRUM.

### C) Methodology

The OR's recommendations were developed in a three-phase process, which was accompanied at four junctures by a Steering Committee in which the General Manager of the gGmbH and representatives of the two shareholders were represented (see Figure 3). Various formats – elucidated in greater detail below – were used to ensure the participation of gGmbH staff and access to diverse external expertise.

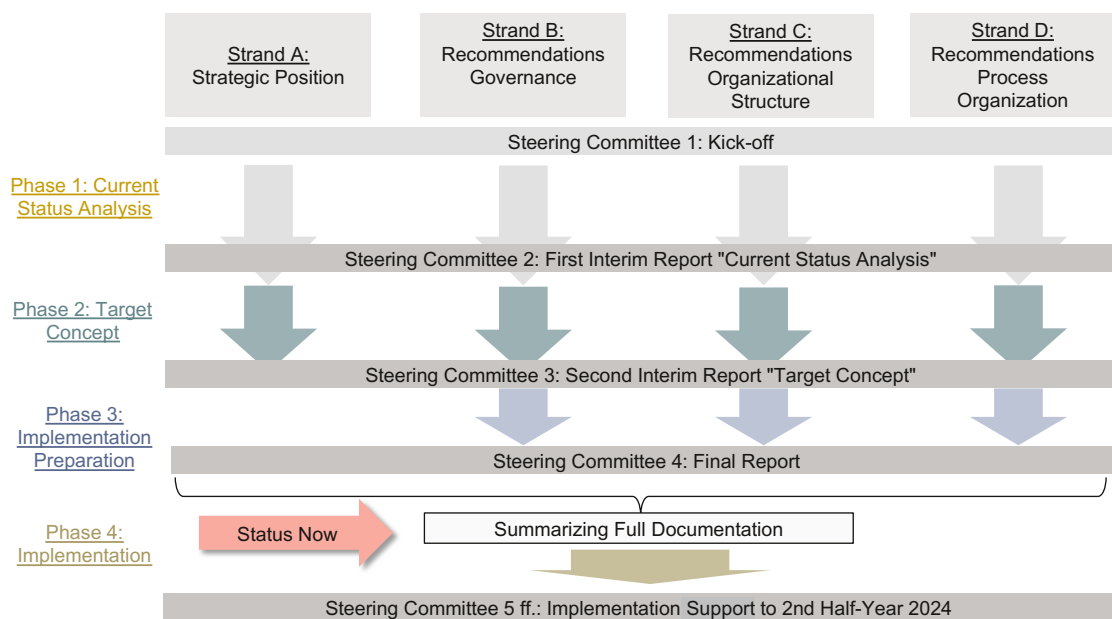


Figure 3: Project Flowchart

The procedure for each phase is explained individually below.

**The first phase** took place in April and May 2023 and served to collect data and record many different perspectives on the current status and development prospects of the gGmbH. To this end, METRUM analyzed an extensive variety of internal and publicly available external data sources and reports and conducted background interviews with at least 29 external experts (including members of the Supervisory Board, some former General Managers, department heads, numerous Artistic Directions, members of the Finding Committees and sponsors) as well as 24 members of present staff. The external and internal background interviews were all conducted on a strictly anonymous basis – including towards the gGmbH and its shareholders – and no statements whatsoever directly or indirectly attributable to individuals were passed on. The purpose of these background interviews was therefore not to ask for specific statements; rather, the aim was for METRUM to assess and learn about the very different perspectives, assessments and arguments as fully as possible, to better understand them by asking questions during the interviews and then – in an anonymized form – to use them as part of the analysis and justifications for recommendations.

Three workshops were also held in the first phase, in which participants from both the gGmbH and the shareholders took part:

- A workshop on the topic of Strategy to understand the development approaches for the coming years in line with the guiding principle "structure follows strategy" described above.
- A workshop on the topic of Governance to understand the current and historical functioning of the different governance and other created bodies and their interaction with the General Manager and Artistic Direction and to identify possible deficits.
- A workshop on the topic of Organization particularly to ask the numerous members of the other management levels of the gGmbH represented in this workshop how the current organizational structure and process organization is to be understood and what deficits exist.

In addition to the involvement in the background interviews and workshops, the participation of the entirety of all gGmbH employees was ensured by:

- An information forum held at the start of the project where the timetable and project objectives were presented.
- An employee information sheet with the content communicated in the forum sent to everyone by e-mail.
- A secure e-mail address set up so that all employees could send feedback and comments directly to METRUM.
- A discussion held with the newly founded Workers Council of the gGmbH.

All results of the first phase were presented to the project's Steering Committee in form of a current status report. The contents of this analysis are presented in Chapter D of this final report.

The **second and third phases** took place overlapping from June to September 2023 and served to jointly discuss, adapt and flesh out METRUM's initial ideas for recommendations and to check their feasibility before they were finalized in the form of METRUM's Target Recommendations.

To this end, three workshops were held in June 2023, each of which was attended by staff members from both the gGmbH and the shareholders:

- A workshop on the topic of Strategy to present METRUM's interpretation of the strategy, review it together and discuss which aspects of it will play an important role as a basis for the OR.
- A workshop on the topic of Governance to discuss METRUM's initial ideas for solutions together at an early stage, identify the need for more concrete solutions and define rough directions.
- A workshop on the topic of Organization, also to discuss METRUM's initial ideas for solutions together at an early stage, to identify the need for more concrete solutions and define rough directions.

After this round of workshops, there was an ongoing exchange with the Management of the gGmbH and many individual employees from the departmental management level (Heads) in order to flesh out METRUM's analyses, supplement the database and develop a common understanding.

On this basis, two more workshops were held in August 2023, in which people from both the gGmbH and the shareholders took part:

- A workshop on the topic of Governance to present and discuss concrete solutions, in some cases already formulated into wordings.
- A workshop on the topic of Organization in order to present and discuss concrete solutions, in some cases already formulated into wordings, advanced draft diagrams or quantifications.

Selected questions were discussed with the Steering Committee at the beginning of September 2023. On the basis of all these findings and feedback, a first complete draft version of the Recommendations was presented to the Steering Committee by the end of September 2023. These were jointly discussed and probed for plausibility, further scrutinized and in places refined and are now presented as final recommendations in Chapter E of this final report.

Staff involvement was continued by holding a second information forum after the presentation of the Recommendations in the Steering Committee, where the current project status and a selection of recommendations agreed with the General Manager none of which were subject to approval by the different governing bodies, were presented. Afterwards, all METRUM consultants were available to answer staff questions. In METRUM's view, this event was received very positively by staff who displayed a great deal of understanding that a number of recommendations – all of which are subject to approval by the governing bodies – were not discussed at the event.

After presenting the recommendations in this final report, a **fourth phase** will follow during which the gGmbH and METRUM will continue to work together until the second half of 2024 so as to implement those recommendations decided upon by – depending on responsibility – the Management of the gGmbH and/or the Supervisory Board and/or the shareholders. The purpose of this implementation phase is to ensure that METRUM is always available to support the gGmbH in implementing the recommendations made and is also able to adapt or specify the recommendations if necessary. How exactly the initial or an adjusted Steering Committee and staff are involved in the fourth phase is to be decided based on the specific needs of the ongoing process.

## **D) Analysis of the Current Status**

All in all, a Situation Analysis reveals a highly renowned and successful cultural institution with a unique and clearly definable character, but one that is highly prone to error due to its sometimes very informal and ambiguous structures and dysfunctional governance – something that has been particularly evident in the last two editions of the documenta exhibition.

The results of the analysis are presented in detail below.

### **Strategy Analysis as a Basis**

Although it was not the purpose of the OR to make recommendations on the strategic development of the gGmbH, METRUM – as described above – performed an analysis of the strategic positioning and strategic developments in order to utilize these as the basis for the OR. This analysis produced the following results:

**Analysis 1:** The documenta exhibition is one of the very few TOP-1 positionings among German cultural institutions clearly recognized worldwide.

**Analysis 2:** Important aspects of an implicit, non-formulated mission statement of the documenta exhibition are (without any claims to completeness and in no particular order): primacy of art, internationality, renewal/radicality, project character of the exhibition, high reception success (public and specialist discourse), topicality.

**Analysis 3:** The most important core brand appeal of the documenta exhibition is its five-year project character, in which each exhibition establishes its own, artistically new and independent brand. The independent process of finding a new Artistic Direction, which is determined solely by contemporary artistic discourses and not subject to any political influence, is pivotal for this core brand appeal – and thus ultimately also for the success of the documenta exhibition.

**Analysis 4:** The brand architecture of the four other areas (Museum Fridericianum, documenta archiv, documenta Institute and documenta Halle) and their brand relationship to the gGmbH and the exhibition are unclear, especially in the case of the Fridericianum, which is the only institution that has no direct connection to the documenta exhibition in content terms.

**Analysis 5:** There are currently no written development goals for the entire gGmbH for the coming years, but there are initial verbally formulated ideas and plans in which crisis resilience, staffing requirement planning, role clarification, brand architecture and the renovation of the building's fabric are at the top of the list.

## Governance Sphere

The analysis provided the following results:

**Analysis 6:** The functionality of the Supervisory Board of the gGmbH was disrupted by problems in the context of the 14th and 15th editions of the documenta exhibition. This was firstly due to its – in METRUM's impression – excessive number of members (twelve people), secondly due to a lack of confidentiality and thirdly due to the fact that its powers were limited because the Shareholders' Assembly assumed many decisions to itself, also for the reasons mentioned above. An existing but dysfunctional Supervisory Board and a Shareholders' Assembly that assumes a large part of the supervisory function clearly contradicts the Public Corporate Governance Code of the State of Hesse (and also that of the Federal German Government), which clearly requires that there should be exactly one supervisory body in which the main supervisory activities are bundled and no competition between bodies comes to light.

**Analysis 7:** The disruption to the functionality of the Supervisory Board played an important role in the decision of the Kulturstiftung des Bundes to withdraw from the Supervisory Board – since membership of the Supervisory Board created the impression of shared responsibility, while in fact there was very little scope for influence.

**Analysis 8:** After the withdrawal of the Kulturstiftung if not prior to this, there was a lack of topical artistic expertise on the Supervisory Board. This fact is already mentioned in the final report of the expert advisory panel (p. 128) and was also confirmed in METRUM's analysis in background interviews.

**Analysis 9:** The various internal documents (Rules of Procedure for the Management, Schedule of responsibilities and Contracts with the Management and Artistic Directions) paint an unclear and sometimes contradictory picture of the division of responsibilities between the General Manager particularly and Artistic Directions. The resulting blurring of responsibilities is also described in the final report of the expert advisory panel (p. 124). This is also important for governance because the General Manager and Artistic Direction represent the work of the gGmbH vis-à-vis the Supervisory Board and Shareholders' Assembly.



**Analysis 10:** On the one hand, reducing the role of the General Manager to commercial and staff administration issues is rejected in most background interviews. On the other hand, an expansion of the role to include curatorial co-determination is equally rejected in most background interviews.

**Analysis 11:** The gGmbH's financial controlling for documenta fifteen improved significantly compared to the 14th edition of the exhibition through more binding internal processes and the use of adequate systems and was largely effective – i.e. there were no significant unplanned budget deviations. This is an extremely positive development in the wake of the 14th edition, not particularly recognized due to the recent developments of documenta fifteen, but which has brought about sustainable and effective procedural improvements for the gGmbH.

**Analysis 12:** In the past, there have been various bodies referred to as "Advisory Boards" ("Beirat"), for instance a body strongly related to the City of Kassel and its citizens in the exhibition's 12th edition or one identical to the Finding Committee at documenta fifteen, which primarily advised the Artistic Direction. All of these attempts to form an advisory board were fraught with problems, especially the one at documenta fifteen, because it acted primarily as an advisory board to the Artistic Direction due to the personnel overlap with the Finding Committee and thus did not function as a neutral advisory body for the General Manager and the Supervisory Board either.

**Analysis 13:** The expert opinion of Prof. Dr. Christoph Möllers on Constitutional Law Limitations and Constitutional Protection Requirements and Grants of State Cultural Funding ("Grundrechtliche Grenzen und grundrechtliche Schutzgebote staatlicher Kulturförderung") makes the following clear in METRUM's view: The General Manager of the gGmbH has a clear constitutional duty to influence the Artistic Direction informally and in an open dialogue if racist, sexist, anti-Semitic or other discriminatory content – even below the level of criminal prosecution – clearly comes to light. However, this informal influence must not be hierarchical and must not act as "pre-control" or "censorship". The most extreme form would be a written contextualization against the will of the Artistic Direction in close proximity to the artwork. However, any active intervention in art (even merely "preventing it" during ongoing operations) remains constitutionally prohibited by artistic freedom.

**Analysis 14:** One possibility to exert viable and acceptable influence in this way could be a Code of Conduct, as suggested, for example, in the final report of the expert advisory panel (p. 6, Point d).

On the other hand, the approach of drawing up a "Code of Conduct", which a new Artistic Direction finds as a predefined framework for their work, is met with very serious reservations in most background interviews and, at worst, is seen as a serious restriction of artistic freedom.

**Analysis 15:** The only two valid options for changes to the legal form structure worthy of discussion are as follows: The first option would be full privatization in order to entirely remove the public sector from the sponsorship and thus defuse the conflicts described in Analysis 13. The second option would render it necessary to hive off parts of the company in the event of a Federal Government participation in the ownership – this would affect the Fridericianum in particular, as it would probably not be appropriate for the Federal Government to participate in the sponsorship of the Fridericianum. The first option is associated with severe financial risks for the gGmbH and the documenta exhibition linked to extreme reputational risks for the City of Kassel and the State of Hesse. The second option is conceivable in principle but would require far-reaching changes in responsibilities at shareholder level and in downstream operational processes.

**Analysis 16:** A visible involvement of the Federal Government in the governance of the gGmbH would be appropriate given the importance of the documenta exhibitions and would secure the Federal Government's financial contributions in the long term. There are various options for structuring this involvement.

## **Organizational Sphere**

In the analysis, the topics of organizational structure and process organization were considered together; in the recommendations in Chapter E, recommendations on organizational structure and process organization will each form a separate section. The joint analysis produced the following results:

**Analysis 17:** Many staff identify strongly with the gGmbH. This very high level of motivation is one of the key resources for realizing the exhibitions, but it is in serious jeopardy against the backdrop of the problems, especially with documenta fifteen and the public debate surrounding it.

**Analysis 18:** The changing demands and requirements in the documenta exhibition cycle (e.g. large increase in personnel, great time pressure, high media attention) are an enormous challenge for the organization.

**Analysis 19:** The organization must retain a degree of flexibility to be able to respond to the different self-perceptions and artistic understandings of the changing Artistic Directions (see also Analysis 3).

**Analysis 20:** There is no current functioning Organizational Chart for the gGmbH. Various existing documents are partly contradictory and partly outdated. This deficiency can also be explained by the regular, major changes (see Analysis 17), but represents a significant weakness that increases the proneness to error.

**Analysis 21:** Without a functioning Organizational Chart, management structure is also unclear in several places ("Who exactly reports to whom? Who is a departmental head?") and the distinction between organizational and artistic areas is particularly blurred. This also substantially increases proneness to error, for instance because misunderstandings occur or management responsibilities are not clearly assigned.

**Analysis 22:** The interfaces between centrally assigned activities and decentralized activities (in particular Education & Communication, Public Relations and Marketing), some of which are only temporarily assigned in the individual sub-organizations, are not always clear. This can lead to a lack of clarity regarding responsibilities and duplication of work.

**Analysis 23:** Responsibility for internal communication is not clearly assigned and there are no clear processes or platforms for this. At the start of the Situation Analysis, there was no clearly staffed management meeting where all members of the second management level regularly meet and liaise with the General Manager or at times the Artistic Direction.

**Analysis 24:** The responsibility for external communication is not clearly defined – especially when interacting with the Artistic Direction – and there are no clear processes for this. To a certain extent, this lack of clarity is unavoidable before the appointment of a new Artistic Direction, because responding to and echoing the new approach of a new Artistic Direction is part of the gGmbH's core brand appeal (see Analysis 3). However, if this lack of clarity persists even after the appointment of a new Artistic Direction, this represents a significant disruption to crisis resilience.

**Analysis 25:** The gGmbH has no established conflict and complaints procedure and no independent point of contact for staff who experience discrimination or abuse of power. When (internal) conflicts arose, particularly with temporary staff during documenta fifteen, a temporary office was set up on an ad hoc basis, but this did not have much impact.

**Analysis 26:** The employment relationships in the various sub-organizations vary considerably. Some positions are covered by collective agreements, others are not, some are fixed-term, others are not – without a clear rule being established as to why which position is treated how. These circumstances make it very difficult for the gGmbH to recruit good staff and retain expertise for critically important positions.

**Analysis 27:** There is no effective knowledge transfer enabling the gGmbH to leverage the know-how of departing employees – especially after an exhibition, when many temporary staff leave the organization. There is also no overarching process for on- and offboarding the numerous temporary employees, only individual initiatives have been established in some departments.

**Analysis 28:** The degree of digitalization within the gGmbH varies greatly. While very modern applications are used in some areas, others are far from exploiting the potential of digital applications – particularly in the realm of Customer Relationship Management (to systematize the customer and contact approach), Content Management (to systematize and facilitate the use of all content databases as well as artistic artefacts and the collection) and for comprehensive digital project organization, modern digital solutions are lacking. There is also no comprehensively coordinated digital strategy on how all applications and system components work together.

**Analysis 29:** The workspaces of the gGmbH's core team are spread across many buildings and only partially meet the standards of modern office and workspaces. Additional challenges arise for the documenta exhibition due to the growing number of staff.

**Analysis 30:** Specific risks are recorded and dealt with already today, but there is no comprehensive (360°) and systematic analysis and no corresponding holistic management of risks. Reputational and personnel-related risks (departing staff, lack of motivation, discrimination) are important examples of risks that are currently insufficiently recorded and addressed. The fact that such comprehensive risk management have not received sufficient attention has been demonstrated by a number of issues and challenges faced by documenta fifteen.

## E) Recommendations

All in all, the Recommendations paint a picture of an institution that is aware of its unique selling points and strengths, that clearly wishes to preserve these and protect them even better in the future, and that can substantially reduce its proneness to error and "friction losses" through a "professionalization drive" in order to become significantly more crisis-resilient and efficient in the future.

All of the OR recommendations are presented below in tabular form with their prioritization level rated by METRUM:

|                          | Recommendation  | Priority  | Additional Financial Outlay (estimated) <sup>1</sup> |
|--------------------------|---|-----------|--|
| Governance               | 1 Retention of the Finding Committee with slight improvements   | Medium    | None   |
|                          | 2 Two Codes of Conduct on an equal footing  | Very high | None   |
|                          | 3 Optimization of the Supervisory Board and establishment of a Scientific Advisory Board (incl. amendment of Articles of Association) | Very high | None   |
|                          | 4 Clarification of the tasks of Management and Artistic Direction (incl. new Rules of Procedure)                                      | Very high | None   |
| Organizational Structure | 5 New Organizational Chart with four management levels  | Very high | No direct outlay <sup>2</sup>                        |
|                          | 6 Earlier recruitment of strategically relevant positions at the third management level   | Medium    | € 138,000 to € 247,000 p. a.                         |
|                          | 7 Differentiation between disciplinary personnel management and subject-matter related personnel management                           | High      | None   |
|                          | 8 New Organizational Learning and Development department  | Medium    | None   |
|                          | 9 External Ombudsman's Office   | High      | € 5,000 to € 20,000 p. a.                            |
|                          | 10 Pooling of resources in Education/Mediation and Communication, Public Relations and Marketing                                      | Medium    | None   |
|                          | 11 Comparability in the salary structure  | High      | € 115,000 to € 155,000 p. a.                         |
|                          | 12 Permanent employment of more staff responsible for core tasks  | High      | None   |
|                          | 13 Sufficient personnel resources in strategically and substantively relevant areas   | diff.     | € 195,000 to € 264,000 p. a.                         |
|                          | 14 Optimization of core processes   | High      | € 10,000 to € 20,000 (one off)                       |
| Process Organization     | 15 Introduction of a Risk Management System   | High      | None   |
|                          | 16 Introduction of a Management Board   | Very high | None   |
|                          | 17 Introduction of various approaches to "soft" internal communication  | High      | None   |
|                          | 18 Performing a Process/IT Application Analysis of the entire application landscape   | Medium    | € 10,000 to € 20,000 (one off)                       |
|                          | 19 Introduction of a Digital Knowledge Management and Feedback Tool   | High      | € 15,000 to € 20,000 p. a.                           |
|                          | 20 Introduction of a Digital Task Manager   | Medium    | € 15,000 p. a.                                       |
|                          | 21 Examination of the introduction of a flexible multi-year working time model for ca. eight lead positions                           | High      | € 10,000 to € 15,000 (one off)                       |
|                          | 22 Leave key make-or-buy decisions unchanged  | Medium    | None   |

Figure 4: Overview of All Recommendations. 1) Smaller sums in three- and four-digit range are not taken into account here. 2) No direct additional financial outlay, but staff planning, particularly at the lower levels, must be considered in the context of the overall budget. The estimates of additional financial outlay in Recommendations 12 and 13 represent the additional requirements clearly arising from the OR. This does not include cases where existing posts in the staffing plan that were filled in the past are refilled – as allocating funds to existing positions does not require an OR recommendation. However, because some positions were not filled or not continuously filled in 2023, allocating funds to these positions from 2024 onwards can presumably mean that the actual additional Financial Requirement in 2024 cannot be justified by the OR alone. The background to this is that METRUM was not commissioned to prepare a business plan and therefore the rough estimates of the additional requirements resulting from the OR did not have a clear financial "starting point".

Three central so-called Framework Conditions for all 22 Recommendations are explained below and then each individual recommendation is explained and contextualized. Possible financial requirements are explained where necessary.

## **Framework Conditions for the Recommendations**

Three points are listed below which are not strictly speaking recommendations, but which have emerged with good reason as Framework Conditions over the course of the project and in consultation with the Steering Committee.

**Framework Condition 1:** The legal structure will remain unchanged (gGmbH). The main reason being that the two arguments for adjustments of the legal structure were found not thoroughly sweeping in consultation with the Steering Committee (see also Analysis 15). As indicated full privatization would entail numerous existential risks; and there are no specific ambitions for the Federal Government to become involved on ownership level, which might have made it necessary to hive off the Fridericianum into a new independent legal form (see Framework Condition 2).

**Framework Condition 2:** The shareholding structure of the gGmbH will remain unchanged at 50% City of Kassel and 50% State of Hesse. The reason for this stipulation is that, based on current information, there is no clear, strong need for co-sponsorship by the Federal Government, which would be justified in view of visibly high political hurdles (city and/or state would have to give up shares) and administrative hurdles (the gGmbH would then have to work in accordance with three comprehensive budgetary regulations). However, METRUM believes involvement of the Federal Government in the ongoing Governance is urgently required and is therefore part of the Recommendations (see Recommendation 3).

**Framework Condition 3:** Implicit considerations regarding the mission statement and brand strategy were taken into account, but these two topics were not explicitly developed as part of this OR. As set out in Analyses 2, 4 and 5, the gGmbH does not currently have an explicitly formulated mission statement or an explicitly formulated brand strategy. However internally, very specific ideas, opinions and considerations are held on both topics. For the OR, these considerations were discussed together in the first phase and used in their implicit form as the basis for the Recommendations. Whether the explicit formulation of a mission statement and/or a brand strategy for the gGmbH makes sense in the medium term must be weighed up by the Management primarily in terms of their prioritization in view of the many issues at hand.

## **Recommendations in the Governance Sphere**

### **Recommendation 1:**

The work of the Finding Committee should largely remain as before. In future, it should no longer spill over into the Governance of the exhibition but should

dissolve as a committee once a new Artistic Direction has been appointed. The General Manager of the gGmbH should continue to submit a proposal for the composition of the Finding Committee to the Supervisory Board, as was customary before the Finding Committee for the 16th edition. The Supervisory Board should then – without influencing the choice of individuals, not even in the form of making its own suggestions – either appoint this choice as the Finding Committee. Or, if the choice obviously fails to meet the standards of diversity set out below, the Supervisory Board should give the General Manager the task of compiling a new choice – again without exerting any influence regarding the choice of individuals. Subsequently, in the same process as before, the Finding Committee should begin its work and at the end make a single proposal for the Artistic Direction, which is then presented to the General Manager, which then – without substantively influencing the choice – follows this recommendation of the Finding Committee, appoints the Artistic Direction of the next exhibition and concludes a contract with it.

METRUM only proposes improvements to this fundamentally proven process in two respects:

- Firstly, the entire process of appointing and working with the Finding Committee should be brought to the attention of the Supervisory Board in writing in a timely manner.
- Secondly, the General Manager should commit to ensuring maximum diversity in the line-up of the Finding Committee through "soft quotas" and an open process. This means the General Manager starts at an early stage to broadly solicit ideas as to which people could be considered for inclusion in the Finding Committee. This also means that when putting together the Finding Committee, the General Manager ensures the committee is diverse and reflects different perspectives in terms of artistic profile, geographical origin, socio-economic background, sexual identity, gender, age, etc., among other things.

Both the appointment process and the work of the Finding Committee itself as well as the "soft quotas" should explicitly not be submitted to the Supervisory Board for approval so as to not restrict the existing independence of the Finding Committee's work.

**Reasoning:** Leaving the appointment process and the work of the Finding Committee largely untouched is justified in METRUM's view (see also Analyses 1 and 3) because the brand's global TOP-1 positioning is closely linked to the integrity of the tried-and-tested process of the Finding Committee, which should therefore not be substantially changed.

The clear separation of the Finding Committee from governance strengthens the independence of the Finding Committee and its ability to deal with purely artistic content, and also addresses the problematic role of the Advisory Board ("Beirat") at documenta fifteen (see Analysis 12).

Communication of the appointment process and the work of the Finding Committee to the Supervisory Board and the Management's voluntary commitment to selection criteria serve to ensure the transparency of the process.

The fact that the General Manager should continue itself to be responsible for the selection is crucial: METRUM believes that the General Manager must establish a personal relationship of trust with the members of the Finding Committee in order to successfully perform this absolutely pivotal but very sensitive process for the documenta exhibition together. The selection of the Finding Committee by the General Manager is the necessary start for this personal relationship because it is founded on a mutual, personal commitment.

An indication that the personal selection of the Finding Committee by the General Manager is a successful model could also be that both the selection of the Finding Committee for documenta fifteen<sup>1</sup> and the selection of the recently resigned first Finding Committee for the 16th edition of the exhibition both took place before the present General Manager took up duties.

The fact that the process is assigned to the General Manager also ensures the independence of the process and allows the process to benefit from the high level of operational expertise on the management's side.

## **Recommendation 2:**

Two Codes of Conduct should be drawn up in the gGmbH<sup>2</sup> :

- One Code of Conduct for the gGmbH itself, which is now being developed in timely fashion in a participatory process, finalized by the General Manager and submitted to the Supervisory Board for approval. This Code of Conduct is intended to describe the basic values guiding all the gGmbH's actions. One focus should be to make it clear that the gGmbH takes an unambiguous stance against anti-Semitism, racism and other forms of discrimination and will use its influence to achieve this goal while respecting artistic freedom. A further focus of this Code

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<sup>1</sup> According to research conducted by METRUM, the Finding Committee for documenta fifteen was already appointed by July 2018 if not before, but the General Management, which was active during documenta fifteen, only took up its duties in November. However, there are media reports that the Management was already involved in the selection of the Finding Committee before it began its work.

<sup>2</sup> METRUM defines a "Code of Conduct" as a voluntary commitment that describes the fundamental ethical values of an organization. Particular attention is paid to the avoidance of discriminatory actions by members of the organization that violate human rights, both towards other members of the organization and towards external persons. A Code of Conduct is not to be understood as a legal and justiciable document in the strict sense.



of Conduct is to ensure that internal cooperation and interpersonal contact with external persons is free from discrimination of any kind. Beyond the description of the basic values, this Code of Conduct should not contain any explicit censoring restrictions on curatorial and artistic activities.

- One Code of Conduct for each edition of documenta exhibition anew, which will not be predefined but shall be developed after the appointment of the Artistic Direction in a process to be defined by the Artistic Direction. For this second Code of Conduct, the gGmbH and the General Manager is to enter into a dialogue with the Artistic Direction of each new edition on the basis of its Code of Conduct, but the Artistic Direction is to have the final decision on the content. It should then be submitted to the Supervisory Board for each new edition for information (and explicitly not for approval). This Code of Conduct should describe the basic values of the Artistic Direction for the upcoming edition, it should describe the cooperation with external artists and it should contain passages describing how it is ensured that the upcoming exhibition does not violate human dignity.

Both Codes of Conduct should be published on the website as a declaration of intent helping the General Manager/gGmbH and the Artistic Direction clarify what is of central importance to them and also clarify that both will also enforce these points internally. Neither of the two Codes of Conduct should become part of employment contracts, but a reference to the Codes of Conduct must be an integral part of the onboarding of new employees and also new curators.

The Artistic Direction's contract should stipulate as a contractual duty that they should draw up their own Code of Conduct in the first 100 days after the start of the contract, and that it should be suitable for ensuring that human dignity is not violated in the exhibition – but also that they are free to formulate for themselves how exactly they understand this goal and how they wish to implement it in their free curatorial work. This Code of Conduct should not itself become part of the contract with the Artistic Direction and should not have to be finalized before the contract is signed.

The Management and Artistic Direction are obliged to discuss the two Codes of Conduct at an early stage and identify any differences. This should not result in the creation of a joint new Code of Conduct, but the exchange should create an awareness of the different perspectives throughout the organization and provide an early opportunity to address conflicts productively. If necessary, this exchange should also make it possible, as described in Prof. Dr. Christoph Möllers' report, as a last resort while preserving artistic freedom, for the gGmbH to distance itself from certain artistic content at an early stage and in a well-founded manner without censorship (see Analysis 13 for details).

**Reasoning:** Both the document analysis and the background interviews as well as our interpretation of the constitutional perspective show the need to treat the topic of the Code of Conduct and the general tension between artistic freedom and the avoidance of discrimination in a level-headed and balanced manner (see Analyses 3, 13 and 14). The special feature of the documenta exhibition is that the topic of the Code of Conduct should – quite deliberately – extend a little into the curatorial-artistic sphere. This is not the case with almost all codes of conduct of other German cultural institutions known to METRUM; here, the codes of conduct are almost always limited to keeping internal actions and interpersonal dealings with external persons free of discrimination – i.e. what, in this recommendation, should be the subject of the gGmbH's Code of Conduct. According to METRUM's assessment, almost none of the codes of conduct of other German cultural institutions are interpreted in such a way that they have a direct influence on the artistic content itself. There is a good reason for this, as METRUM believes that artistic freedom would be violated if art had to be guided by a set of rules external to art (with the exception of strict legal prohibitions, which art must of course abide by despite artistic freedom).

The proposed solution takes up this peculiarity by explicitly not establishing such a set of rules external to art. However, by simultaneously requiring the Artistic Direction to freely draw up a Code of Conduct and by stipulating that this self-created Code of Conduct should be suitable for ensuring the preservation of human dignity, it sets a limit to artistic freedom that is compatible with the German Grundgesetz, since human dignity is the top priority there. For this approach to work, the contract with the Artistic Direction must contain the requirement that this Code of Conduct be drawn up promptly, submitted to the Supervisory Board for information and then made public. In terms of content, however, the Artistic Direction must be granted full freedom beyond the protection of human dignity, and there must be no detailed negotiations as to exactly which rules this protection implies and which it does not – because then artistic freedom would be violated.

In this approach, it remains possible that an Artistic Direction may interpret the protection of human dignity in a way that does not correspond to the gGmbH's understanding in some points. In such cases, the proposed solution makes early dialogue on ethical issues a principle: the obligation to draw up and discuss both Codes of Conduct makes it clear at an early stage that the protection of human dignity is of pivotal importance to the gGmbH and its bodies, but it also makes it clear that no censorship or paternalistic control of artistic forms of expression should occur. This approach does not provide clear-cut solutions to all potential ethical conflicts, but only forces them to be dealt with openly. In METRUM's opinion, this is precisely what is appropriate for the complex issues – which also impact the artistic identity of the documenta exhibition.

If the gGmbH and the documenta exhibition implement this proposed solution, METRUM believes that they will take on a pioneering role in the appropriate and balanced handling of the tension between artistic freedom and the avoidance of discrimination: The anchoring in Germany's Grundgesetz and the clear stance that human dignity takes priority is unambiguous and undeniable here. But artistic freedom is taken very seriously and respected in its entirety and the ground for the necessary dialogue is prepared at an early stage. This approach can be seen as an important contribution to the overall discussion in Germany and around the world and, if proven successful, will possibly also be seen as a model by many other cultural institutions – because, as mentioned above, they have not yet resolved the issue either since their codes of conduct are almost always limited to internal activities.

In addition to METRUM's central justification that this solution is an appropriate way of dealing with the tension between artistic freedom and the avoidance of discrimination, there are two further practical arguments in favor of the proposed solution:

- The core brand appeal of the documenta exhibition is that each exhibition is new and artistically independent (see Analysis 2). The documenta exhibition is currently facing the great challenge of rebuilding trust in this core brand and, in particular, of appointing a Finding Committee that is suitable for appointing a new Artistic Direction. If the narrative of the optimizations from the OR were simply that: clear, narrow rules are now established – that go beyond the legal provisions and which an Artistic Direction already has to observe in their contract – then METRUM believes it would be incomparably more difficult to build this trust and appoint a suitable Finding Committee. The proposed solution avoids this problem.
- Currently and after the anti-Semitism incidents at documenta fifteen the gGmbH and the documenta exhibition are under considerable public pressure to take effective measures against all forms of discrimination. Many of the OR's recommendations effectively contribute to this goal, but the Code of Conduct is likely to receive the most attention. If it becomes clear that the gGmbH and its shareholders will in future make the protection of human dignity – in a way that is compatible with artistic freedom – a basic condition of every exhibition, a clear response to this public pressure will emerge that can also be clearly communicated in the media.

### **Recommendation 3:**

The gGmbH's bodies and the performance of tasks should be restructured as follows:

- The main responsibility for supervision is generally assumed by the Supervisory Board, whilst the Shareholders' Assembly is generally limited to a few central tasks.
- The Supervisory Board will be reduced to five to nine members, who (with the exception of two, see below) will be appointed equally by the two shareholders.
- A Scientific Advisory Board ("Wissenschaftlicher Beirat") will be introduced to advise the Management and Supervisory Board, and its chair will be represented on the Supervisory Board with voting rights. The Scientific Advisory Board remains clearly separated from the Finding Committee. The members of the Scientific Advisory Board should all hail from artistic and curatorial as well as scientific spheres and advise the Management and Supervisory Board in this regard, in particular by providing confidential internal advice during change processes and in times of crisis. The Scientific Advisory Board should comprise six or nine members, who are appointed by the Shareholders' Assembly at the proposal of the Supervisory Board. The representatives of the City of Kassel, the State of Hesse and the Federal Government should each be allowed to appoint an equal number of persons to the Scientific Advisory Board (i.e. either two or three each). The proposal for the chair of the Scientific Advisory Board should always come from the Federal Government's representation on the Supervisory Board. The chair of the Scientific Advisory Board should be a voting member of the Supervisory Board.
- The Federal Government is given a voting seat on the Supervisory Board and appoints the chair of the Scientific Advisory Board (see above) and thus a second member of the Supervisory Board.

**Reasoning:** The reason for a clear emphasis on the Supervisory Board as the leading supervisory body of the gGmbH is that an organization needs a single body for this task and splitting it up into several bodies (see also Analysis 6) carries the risk that supervisory responsibilities are not clearly assigned, leading to a blurring of responsibilities. The Public Corporate Governance Code of the State of Hesse also only ever refers to "the" supervisory body and never to several. The Supervisory Board is better suited as a key supervisory body than the Shareholders' Assembly because external persons are able to participate in it (see below).

The reason for reducing the size of the Supervisory Board is because the current number of members was a factor in disrupting the functionality of the Supervisory Board, as found by the Analysis of the Current Status (Analyses 6 and 7) and that, in METRUM's experience, the ideal size of a Supervisory Board for a cultural institution is between 5 to 9 people. While there are also larger supervisory boards in German cultural institutions, only some of the members are usually actively involved in the discourse, which reduces rather than increases the functionality of the board.

The introduction of a Scientific Advisory Board is justified by the analysis (Analysis 8) that more external expertise should be represented in the supervisory body. However, as the Supervisory Board is to be reduced in size, it does not make sense to appoint a large number of external persons to the Supervisory Board. The option of incorporating this expertise into the governance of a cultural institution through a Scientific Advisory Board and then installing the chair of this advisory board as a member of the Supervisory Board is best practice at many important cultural institutions in Germany, particularly in the museum sector. Such advisory boards often provide crucial internal advice in times of crisis and change.

The involvement of the Federal Government in the governance of the gGmbH is justified on the one hand by the international appeal of the documenta exhibition (Analysis 1), and on the other by METRUM's experience that all parties making a substantial long-term contribution to the financing of a cultural institution should be involved in governance – also so that the funding conditions do not create a kind of "governance outside of governance". Now that co-ownership by the Federal Government has not been pursued (see Framework Condition 2), participation in the Supervisory Board via two de facto seats (one direct and one via the Federal Government's fixed right to nominate the chair of the Scientific Advisory Board, who is then a member of the Supervisory Board) is a solutions-oriented approach to implementing what METRUM considers to be important involvement in the gGmbH's and the exhibition's activities. The two seats must also have voting rights so as not to run the risk of co-responsibility in the eyes of the public without actual co-determination (see Analysis 7).

#### **Recommendation 4:**

The division of responsibilities between General Manager and Artistic Direction should be regulated in a binding set of Rules of Procedure for the Management. Essentially, this division should make it clear that the General Manager does not assume on any curatorial tasks, but bears overall responsibility for strategic, organizational and financial issues, is responsible for protecting the values formulated in a Code of Conduct of the gGmbH and represents these in dialogue with the Artistic Direction. If necessary, in extreme cases this can also mean the General Manager has the responsibility to distance the gGmbH from some artistic content without intervening in it itself.

The proposed division of responsibilities is largely based on the models of many successful editions of the documenta exhibition in the past and does not represent a fundamental reinterpretation of the roles. In future, a checklist for the run-up to the documenta exhibition is to be attached to the Rules of Procedure, in which it is bindingly regulated which decisions are to be made

when. The Supervisory Board must be informed of this and the Supervisory Board must give its approval.

**Reasoning:** The analysis has clearly shown the need for a clear and binding clarification of roles between General Manager and Artistic Direction (Analyses 9 and 10). In METRUM's experience, it can often make sense to set out such a division of roles in writing, even in cultural institutions organized as (g)GmbHs, in which only one person is registered as Management and in which there can therefore be no dual leadership in the true sense of the word. The orientation towards the past is justified by the very successful approach of the gGmbH, which grants each Artistic Direction the greatest possible freedom in terms of content (Analysis 1).

The explicit responsibility of the General Manager to uphold the values formulated in the Code of Conduct of the gGmbH without violating artistic freedom arises as a consequence of Recommendation 2.

The approach of drafting a checklist for the run-up to the exhibition is also not new, but rather bundles – albeit now in a binding and comprehensive manner – the various existing approaches to such timetabling, as they have already been introduced in the past in various versions, e.g. as part of curatorial contracts. The systematization of this checklist makes it binding. This makes it clear to the Supervisory Board in particular what happens when, with regard to essential issues. If this coordination does not work well, it provides an "early warning system" enabling the Supervisory Board, as part of its supervisory responsibility, to address emerging problems at an early stage and intervene if necessary.

## **Recommendations in the Organizational Structure Sphere**

### **Recommendation 5:**

The gGmbH should be given a clear, binding Organizational Chart. The Organizational Chart should contain four management levels and remain constant in its structure over the entire five-year period. The extreme fluctuations in staffing levels should be reflected by the fact that parts of the Organizational Chart are only "activated" temporarily and management responsibilities are only partially assumed when the areas set out below them are also currently occupied. The second management level should be that of the department heads and directors ("Heads"), who are employed in constant and permanent positions. An example of this would be the head of the finance department. The third management level should be that of team leaders ("Leads"), which is staffed partly by permanent and partly by temporary employees. Examples would be the accounting team leader or the visitor service team leader. The fourth management level should be that of the

coordinators, which is only staffed at peak times and only ever with temporary employees. Examples would be the coordinators of supervisors or work units during exhibition set-up.

**Reasoning:** The gGmbH does not currently have a clear Organizational Chart (Analysis 20). A clear description of the different management levels within an organization makes it easier to clearly define the roles and the associated responsibilities to see the 'big picture' (see also Recommendation 16). By using a consistent Organizational Chart, communication about the Organizational Chart and the distribution of responsibilities remains clear and easy to understand, which in METRUM's experience is a key success factor for a functioning organization.

**Financial Requirements:** Recommendation 5 in itself has no direct impact on the Financial Requirements of the gGmbH, but the Organizational Chart includes new positions that are individually justified in the following recommendations and which are associated with the Financial Requirements specified there. The staffing below the third management level is not the subject of the OR – this staffing is to be seen in the context of the business planning of the individual exhibitions, in which concrete plans must be made as to which positions are to be filled with how many people in which salary ranges.

#### **Recommendation 6:**

In future, strategically relevant, temporary positions at the third management level should be filled earlier than in the past. According to METRUM's initial assessment, this applies to 18 positions, some of which should be filled three years before a documenta exhibition, some two years before an exhibition and some around 12 months before an exhibition. For around eight of the positions to be filled very early on, it is also conceivable that these people could be permanently employed on a part-time contract as part of a multi-year working time model, increasing their working hours to full-time in the run-up to the exhibition and then compensating for the "extra" working time in the first few years after the exhibition (see Recommendation 21).

**Reasoning:** The sometimes very late hiring of staff for the exhibition greatly increased the pressure on the organization at documenta fifteen (Analyses 17 and 18) and made effective planning, an effective transfer of knowledge and "learning" by the organization much more difficult (Analysis 27). It also functionally disrupted internal coordination and joint communication on difficult topics (Analysis 25).

**Financial Requirements:** An initial rough estimate by METRUM shows that the implementation of this recommendation is associated with additional

requirements of € 138,000 to € 247,000 per year. This additional requirement will in fact not be incurred equally over all years but will be more concentrated in the years prior to the exhibition. For comparability with the other estimates of Financial Requirements, however, the total sum was divided by five and thus notionally allocated equally to all years. The large range in the first rough estimate is due to the fact that METRUM is currently unable to estimate the average monthly salaries of the members of the third management level in the future.

**Recommendation 7:**

In the gGmbH's Organizational Chart, a distinction should be made in future between Personnel Disciplinary and Personnel Management regarding subject matter responsibility. In particular, the "Exhibition Management" and "Education/Mediation" departments, which are responsible for content and curatorial work, should in future be subordinate to the Management in disciplinary terms, but should also be managed by the Artistic Direction in terms of the subject matter aspects of exhibition implementation.

For cooperation in the "Communication, Public Relations and Marketing" department, the General Manager and Artistic Direction should agree in writing at an early stage and in accordance with the overall artistic concept on a division of responsibilities with regard to leadership. Depending on the topic, the department will have to be professionally managed by both, as this department looks after both the gGmbH as a whole and the individual exhibition. However, the communication of the gGmbH and the documenta exhibition should always remain recognizably separate from one another by their own letterhead, even if this communication work is in part carried out by the same staff. For this area, the Artistic Direction should be given the opportunity at an early stage to appoint a separate person for the role of exhibition press spokesperson. This person would then be bound by a work contract and would be managed primarily by the Artistic Direction, even if this person is closely involved in the work of the "Communication, Public Relations and Marketing" department.

If the Artistic Direction does not appoint their own press spokesperson, there is also the possibility that, in the event of a conflict, the management of the "Communication, Public Relations and Marketing" department will issue a binding instruction to distance the gGmbH from statements made by the Artistic Direction and to no longer accept technical instructions from the Artistic Direction. In this extreme case, the Artistic Direction would have to be given the opportunity to issue their own press releases in a manner of their choice, even without a press spokesperson.

**Reasoning:** The ambiguities in the demarcation of management responsibilities (Analyses 9, 21 and 24) have proven to be clear sources of



error in the past. On the other hand, the flexible and project-based structure of the documenta exhibition does not allow all persons to be permanently assigned to a single manager (Analyses 3 and 19). This Recommendation results in the greatest possible clarification in the assignment of management roles while maintaining flexibility and the primacy of art (Analysis 2).

The need to separate the channels of communication between the gGmbH and the Artistic Direction arises from the duty of the gGmbH to distance itself from the curatorial decisions of the Artistic Direction in the event of a substantial conflict of values without violating artistic freedom (see Recommendations 2 and 4).

**Recommendation 8:**

A new "Organizational Learning and Development" department should be established. The department's task should be to work on cross-cutting issues that affect all areas of the gGmbH and whose relevance and complexity increase significantly in the period leading up to the exhibition. Specifically, the department should cover the topics of internal and intercultural communication, accessibility and anti-discrimination, sustainability and visitor services. The department should be staffed with around three permanent employees and, particularly in the area of visitor services, be expanded with temporary staff prior to the exhibition.

**Reasoning:** Due to its particular importance (Analysis 1) and especially in light of the problems at documenta fifteen, the gGmbH should in future serve as a national and international role model on key future issues and tenets such as diversity and sustainability. In particular, since international Artistic Directions and curators will continue to play an essential role in the documenta exhibition in future (Analysis 2), a department that deals with these issues and coordinates internal communication accordingly is urgently needed. In the past, there were deficits in all topics and areas to be dealt with by this new department because the responsibilities were not clearly assigned within the organization (Analyses 23 and 25).

**Recommendation 9:**

In line with best practice, for instance in the university sector, the gGmbH should set up an external, independent Ombudsman's Office that has legal and psychological expertise and is familiar with the structures and specific work situations of the cultural sector.

The Ombudsman's Office should see itself first and foremost as a place of trust for those affected. On their behalf, it can act as an intermediary between the person concerned and the employer. In this way, transgressions and conflicts can be dealt with in a safe space for the person concerned. It is

conceivable that collaboration with existing structures can be leveraged when setting this up. Concrete ideas were exchanged with the gGmbH. Alternatively, a newly established Ombudsman's Office is also conceivable.

**Reasoning:** Over the course of documenta fifteen, it became clear that an independent contact point and established complaints procedures were lacking. This led, for example, to guides and guards voicing their complaints in their own publications or via the press (see also Analyses 23 and 25). In METRUM's assessment, the need for external and neutral support for staff affected by discrimination and/or abuse of power is currently also evident in many other cultural institutions. Such structures are particularly necessary in the context of temporary projects, where fixed operational structures are lacking and there are strong financial dependencies between the people involved. This is evidenced, for instance, by the numerous cultural and media institutions that, together with the Deutsche Bühnenverein, have set up the "Themis Vertrauensstelle gegen sexuelle Belästigung und Gewalt" (Themis Trust Center against Sexual Harassment and Violence).<sup>3</sup>

**Financial Requirements:** METRUM estimates that the costs for an external Ombudsman's Office are in the range of € 5,000 to € 20,000 per year.

#### **Recommendation 10:**

The expertise available in the gGmbH in the areas of "Education/Mediation" and "Communication, Public Relations and Marketing" should be bundled in the future.

In future, the disciplinary and in some cases also technical personnel management of the positions in these areas, which are permanently assigned to other departments of the gGmbH, should lie with the heads of the "Education/Mediation" and "Communication, Public Relations and Marketing" departments and no longer with other department heads.

In addition to the work in the exhibition and research projects, central resources (such as materials for mediation, networks with schools and other educational institutions) could be built up and specialist/technical expertise (for example on the use of social media channels or diversity-sensitive communication) developed, which the sub-organizations then have access to.

**Reasoning:** The current structure is unclear due to the lack of an unambiguous Organizational Chart covering all related aspects, but it does clearly indicate that the few permanent human resources around these topics are spread across different areas (Analysis 24), and that there is no systematic access to these resources by the "Communication, Public Relations and Marketing" management. In the field of "Education/Mediation", the systematic

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<sup>3</sup> By means of this recommendation the gGmbH will meet the central requirements to comply with the new German "Hinweisgeberschutzgesetz" (HinSchG). The exact processes regarding this will be defined as part of the Implementation Support.

and sustainable development of specialist/technical knowledge and conceptual approaches is lacking. In addition, a regional network with different target groups (schools, communities, etc.) needs to be built up, which can then be specifically addressed with various offers from the gGmbH.

**Recommendation 11:**

All positions listed in the staffing plan should be based on the Collective Agreement of German Public Service Employees (TVöD) in future. In some cases, the grading of existing positions should be raised in order to be comparable on the market of cultural institutions in Germany.

In eight cases, this includes the TVöD grouping of employees not previously covered by a collective agreement (in six cases this relates to the Fridericianum) and in six cases a higher grouping of existing staff already grouped in the TVöD. The positions relate to many areas, but in particular to "Communication, Public Relations and Marketing" and "Education/Mediation".

**Reasoning:** Currently, the remuneration system for staff is not uniform – some positions are based on these collective agreements for German Public Service employees ("TVöD") while others are not (Analysis 26). This is an important factor jeopardizing staff motivation – which is one of the gGmbH's key success factors (Analysis 17) as has been elaborated before. Particularly in the realm of public relations, past experience has shown it to be crucial to have highly qualified and motivated staff available, as the gGmbH is in the public eye like almost no other cultural institution and requires professional crisis communication.

**Financial Requirements:** METRUM estimates, on the basis of a job-specific analysis, that the costs for full implementation across all 14 positions will total between € 115,000 and € 155,000 per year.

**Recommendation 12:**

Existing and filled positions covering permanent core tasks should be made permanent. Positions that clearly have an artistic/curatorial profile and where a high degree of innovation and change is desired are excluded from this recommendation. In the case of four positions (two in the field of Law, one in IT and one in Exhibition Management), decisions in favor of these roles by the supervisory bodies of the gGmbH have already been made during the course of the OR – a move that has had a substantial stabilizing effect. This recommendation also concerns three further positions (Office Management, Communication/Marketing and Education/Mediation) which are proposed to be made permanent, all relating to the Fridericianum, in order to help stabilize and increase the combined resources of the entire gGmbH in these areas (see Recommendation 10). For three other temporary and currently unfilled positions (Head of Legal and Policy Issues, IT Specialist and Fundraising

Assistant), METRUM recommends economizing on these positions in favor of other, higher-priority needs, instead of making them permanent (see Recommendation 13).

**Reasoning:** The lack of sustainable knowledge transfer is one of the key current weaknesses of the gGmbH (Analysis 27) operational output. This is exacerbated by regular staff turnover due to systematic use of fixed-term employment contracts. Making permanent the positions primarily assigned to the Fridericianum is also important due to two other reasons: Firstly, the positions in the areas of "Education/Mediation" and "Communication, Public Relations and Marketing" should in future be more closely integrated into the respective specialist departments of the gGmbH (see Recommendation 10) and be established and available here as on-going human resources. Secondly, the Fridericianum's exhibition activities should in future begin again earlier than in the past, directly after the documenta exhibition – leaving no more time for taking on new staff and their induction.

**Financial Requirements:** As all of these positions have already been planned (for a limited period), there is no additional Financial Requirement based purely on lifting this time limit. Because some of the posts were not filled or not continuously filled in 2023, allocating funds to these posts from 2024 onwards may mean that the actual additional Financial Requirement in 2024 cannot be justified by the OR alone. As the specification of the additional requirements did not have a clear financial "starting point", METRUM cannot estimate how high this impact would be. In principle, however, METRUM does not consider the continued allocation of funds to existing and planned positions to be an additional Financial Requirement triggered by the OR.

### **Recommendation 13:**

Strategically and substantively relevant areas and those areas that are responsible for the gGmbH's day-to-day business and grow significantly over the cycle (i.e. bear a great deal of personnel responsibility) should have more and better qualified human resources in future. This particularly impacts the following areas:

- "Communication, Public Relations and Marketing",
- "Organizational Learning and Development" (see Recommendation 8),
- "Production and Venue Management",
- "Digitalization and Knowledge Management".

The staff increase comprises ten positions with a total of around seven full-time equivalents. This increase can be substantially financed by the recommendation to replace three currently planned positions with three full-time equivalents. These recommended savings relate to the positions of "Head of Legal and Policy Issues", "IT Specialist" and "Fundraising Assistant".

**Reasoning:** Creating these jobs is intended to make the new Organizational Chart (see Recommendation 5) fully functional. A separate reasoning of requirements has been drawn up at working level for each individual position concerned. The posts are also individually divided into three prioritization levels.

**Financial Requirements:** METRUM estimates the Financial Requirements to fully implement the creation of the recommended position at around € 195,000 to € 264,000 per year, of which roughly 40% is attributable to Priority Level 1, 45% to Priority Level 2 and 15% to Priority Level 3. The impact of the described savings and reallocation have already been taken into account and have significantly cut the Financial Requirement, which would otherwise have been considerably higher at around seven full-time equivalents. As some of the saved or newly planned positions were not or not continuously filled in 2023, allocating funds to these positions from 2024 may mean that the actual additional Financial Requirement in 2024 cannot be justified by the OR alone. As the specification of the additional requirements did not have a clear financial "starting point", METRUM cannot estimate exactly how high this impact is. If one were to assume that none of the saved or reallocated positions were filled in 2023, the actual additional annual requirement would be around € 200,000 higher. In METRUM's view, however, the continued allocation of existing and planned positions, regardless of the job profiles does not represent an additional Financial Requirement triggered by the OR.

## **Recommendations in the Process Organization Sphere**

### **Recommendation 14:**

Over the course of the OR, particularly relevant, resource-intensive and complex core processes were identified, which are to be mapped and optimized in the next step. All of these core processes are sensitive to timely collaboration and communication of a wide variety of areas. Digital applications are a pivotal component of some of them. These core processes to be optimized in detail are:

1. Budget Management and Controlling,
2. Internal and External Crisis Communication  
(= Crisis Communication Plan, with Definition of Timelines and Responsibilities),
3. Tenders and Awards,
4. Traveling and Looking after Guests (Artists, Team, Patrons),
5. Accreditation,
6. Creation and Application of Labels,
7. Creation and Distribution of Signage,
8. Bookings and Ticketing,

9. Data Storage (Media and Text),
10. On- and Offboarding of Temporary Staff.

**Reasoning:** The lack of internally coordinated, clear and binding processes at documenta fifteen contributed to a lack of clarity regarding responsibilities and to delays and increased staff workload (Analyses 21 to 24). The development of robust processes is the necessary addition to the new Organizational Chart so as to also improve the structure of cross-departmental collaboration. Budget management and controlling are included here, although controlling was significantly improved as a result of the 14th edition of the exhibition. The background to this is METRUM's assessment that, especially in the field of project management and contract management, the contact between the very well-functioning specialist departments "Finances" and "Legal" and the other areas holds potential for optimization – a move that can increase efficiency and ensure continuous transparency of budgets, also with regard to those areas more involved in implementation ("Production and Venue Management"; "Exhibition Management"; "Communication, PR and Marketing").

**Financial Requirements:** METRUM assumes that external support will be very helpful for at least parts of this process development and therefore assumes a one-off Financial Requirement of € 10,000 to € 20,000.

#### **Recommendation 15:**

The gGmbH should introduce a systematic and holistic risk management system. This involves first creating a complete risk inventory and then assessing the probability of occurrence and the potential extent of damage for each risk within the organization. Finally, measures are taken and reviewed in a regular internal process to systematically counteract the most threatening risks (which are deemed very likely to occur and/or would be associated with very high losses) before they occur. Such systematic risk management shall also be part of the reporting system to the Supervisory Board.

**Reasoning:** The analysis has shown that although the gGmbH has monitored and managed specific and individualized risks well in the past, there is no comprehensive overview of all risks (Analysis 30). However, an overview of this kind is crucial in order to be able to identify in good time those risks currently no-one is aware of, at a certain strategic distance from operational issues. In this way, the gGmbH's crisis resilience can be fundamentally improved ("360° perspective" being the key phrase here). In addition, appropriate risk

management meets best practice standards of complex organizations, which undoubtedly applies to the gGmbH.

**Recommendation 16:**

To ensure effective management and very good internal communication, METRUM recommends establishing a Management Board for the gGmbH in line with the new Organizational Chart (see Recommendation 5). Only the Heads and Directors as well as the General Manager and Artistic Directions should be represented on the Management Board of the gGmbH.

A stringently managed board creates a shared overall view of all issues at stake at the gGmbH and the exhibition. This shared overall view is a key management tool. It creates commitment in management, binds the first and second management levels to common goals, clarifies direction, priorities and responsibilities and forms the basis for uniform internal communication.

The content and results of the Management Board meetings must then be communicated by the departmental and division heads, in each case at their own responsibility.

**Reasoning:** Management communication at the gGmbH has not been ideal in the recent past (Analyses 17, 21 and 23). Criticism can not only be levelled at the lack of communication content and form, but also at the impression increasing over time of a lack of broad involvement of the entire second management level – because, according to background interviews, only a few specific managers were included in the Management View. This made it impossible for the management team as a whole to provide good and effective leadership. This recommendation directly counteracts this negative development thereby engendering an overall responsibility of the management team for the gGmbH.

**Recommendation 17:**

METRUM recommends holding regular "townhall meetings,"<sup>4</sup> meetings of the entire team as an active communication format, especially for the years with fewer staff. Here, relevant information should be shared from the top down and teams or individuals should be given the opportunity to present developments, ideas, solutions and their implementation from the bottom up. The format can also be used for external impulse generators and can be creatively varied through moderation or additional interactive formats.

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<sup>4</sup> In the corporate context, a townhall meeting, also known as an all-hands meeting, is a meeting initiated by the management for all staff. It is a widely used tool for comprehensive, internal communication.

Instead of traditional newsletters – which often require a great deal of effort to design – METRUM recommends low-threshold internal news feeds that are written informally and spontaneously and which also allow for comments. These can replace the "townhalls" if the staff increases and time pressure before a documenta exhibition becomes too great. These low-threshold news feeds can be implemented very easily in digital groups (Teams chat, Signal, WhatsApp, email, etc.) and do not require introducing any major new software. Alternatively, the introduction of a more comprehensive intranet solution is conceivable, but this should be seen in the context of the prioritization of various planned digital projects and would probably have to be postponed in the short term.

### **Recommendation 18:**

METRUM recommends carrying out a process/IT application/system analysis. The aim here is to determine a consistent technical/system-related starting point for all future applications as a minimum requirement (the keyword being "interoperability").

In addition to this overarching view, METRUM recommends prioritizing four IT topics in the short term so they can be implemented at an early stage with a realistic view to the upcoming 16th edition of the exhibition in 2027. These four topics are as follows:

- Optimization of the Customer Relationship Management System (Contact Data, Customer Approach),
- Standardization of the Content Management System (Object Databases, Documentation, Media),
- Introduction of a Tool for Institutional Knowledge Management (see Recommendation 19),
- Introduction of a Tool for Digital Task Management (see Recommendation 20).

METRUM has already exchanged experience and data regarding the first two topics with the Management during the course of the OR.

**Reasoning:** Taking a systematic, comprehensive look at an organization's IT landscape at an early stage helps to consider long-term perspectives, even when individual software launches are necessary in the short term. This does not necessarily have to be accompanied by a long digital strategy process. Analysis 28 has revealed that this comprehensive view does not currently exist.



**Financial Requirements:** METRUM assumes that external support is required for this comprehensive analysis and assumes a one-off Financial Requirement of around € 20,000. The analysis does not result in any direct follow-up costs, but rather a strategic overview that ensures compatibility for all other software projects (see for instance Recommendations 19 and 20) and can therefore even reduce follow-up costs.

**Recommendation 19:**

To ensure effective knowledge management, a digital application solution should be selected in the short term. This application should in any case already be available from Q3/2024 so as to leverage this digital tool to deliver institutional knowledge for the 16th edition of the exhibition.

In addition to storing knowledge and retrieving information, successful knowledge management requires the regular acquisition of new knowledge from experience. METRUM therefore recommends that the knowledge management tool should also feature a digital feedback option. As part of the implementation support, METRUM will assist the gGmbH in compiling an overview of possible digital solutions.

**Reasoning:** Knowledge management and the closely related on- and offboarding of staff were identified as an important field needing further development (Analysis 27). In METRUM's assessment, the implementation of these improvements nowadays necessarily goes hand in hand with a digital application, as this offers possibilities no other means of processing can provide.

**Financial Requirements:** METRUM assumes that the introduction, support and use of this system will cost around € 15,000 to € 20,000 per year, possibly a little more at the beginning and a little less once up and running.

**Recommendation 20:**

METRUM recommends the introduction of a standardized digital task manager with which tasks can be assigned, information can be shared and project statuses and successes can be monitored in real time.

The selection of a suitable application should be based on a simple or weighted scoring model and a test run and can be supported by an external consultant. Introduction by Q3/2024 is feasible.

METRUM has carried out an initial review of available tools and those suitable for the gGmbH and is making them available for implementation.

**Reasoning:** The documenta exhibition cycle poses increasing challenges for its core organization as the preparation period progresses in order to manage the increase in staff and tasks. In the two years before the exhibition, both staff and tasks increase considerably in scope and intensity, posing major challenges for the organization (Analyses 18 and 19). A digital task manager is an effective tool for managing and securely controlling these processes, as coordinating everything via face-to-face meetings or individual emails would cause major "frictional losses".

**Financial Requirements:** METRUM assumes that the introduction, support and use of the system will cost around € 15,000 per year, possibly a little more at the beginning and a little less once up and running.

#### **Recommendation 21:**

METRUM recommends closely examining the introduction of a flexible multi-year working time model by means of a "flexi account" for up to eight positions at the third management level, who would then be permanently employed on a part-time basis, but who could distribute these part-time hours in such a way that they would work full-time during the exhibition phase and much less or possibly not at all at other times.

According to an initial assessment, the following eight positions could be considered: Lead Visitor Services, Lead Digital and Accessibility, Lead Marketing & Ticketing, Lead Visual Design, Media and Signage, Lead Sponsoring, Fundraising and International Friends, Lead Hospitality and Travelling, Lead Publications, and Lead Curatorial and Research Assistance.

A "flexi-account" is a special form of uneven distribution of working time where there is no fixed compensation period. This means that accumulated working time (positive and negative balances) may remain in a time account beyond the 12-month period that is usual for annual time models and can be settled on an ongoing basis.

The introduction of a "flexi-account" requires a voluntary works agreement for the gGmbH. In such a flexi-account works agreement, the parties would have to freely agree on a company-specific basis:

- Upper limits for plus hours and lower limits for minus hours,
- Procedural regulations in the event of over- and underruns,
- Dealing with time balances in the event of termination of an employment relationship,
- Securing time accounts against insolvency over 300 hours.

Due to the complex legal requirements associated with introducing this, METRUM recommends working with a specialist consultancy for further examination and implementation. For example, the RKW Hessen – by chance also based in Kassel – could be considered, being i.a. supported by the State of Hesse.

**Reasoning:** It is clear that the inadequate securing and maintaining of institutional knowledge is a problem for the gGmbH (Analysis 27). In addition to a knowledge platform for institutional knowledge (see Recommendation 20), a further measure to counteract this problem would be committing to a permanent contract for those positions with fluctuating time requirements. Up to now, these employees have always been made redundant after the end of the exhibition and in many cases their knowledge has been completely lost to the organization.

However, since the situation is complicated in terms of labor and social security law, METRUM only recommends checking what would be possible as a first step – simply to have this option available as a tool for future personnel planning.

**Financial Requirements:** METRUM assumes that a one-off cost of around € 10,000 to € 15,000 will be incurred for this labor law audit.

#### **Recommendation 22:**

METRUM recommends a differentiated approach to "make-or-buy" decisions based on areas of activity:

For the following areas, the gGmbH should continue to provide temporary employment instead of using external service providers. This has also largely been the case in the past:

- Guards,
- Information and Press Center,
- Café,
- Cashdesk,
- Hospitality.

A final decision should be made with regard to the field of Mediation and Guides on the basis of the concept of the future Artistic Direction in order to appropriately reflect the specific significance of the topic of mediation in the overall concept and to underpin it with personnel.

Outsourcing should be considered for the areas of "Security", "Set-up and Dismantling" and "Telephone Switchboard".

**Reasoning:** The insourcing already practiced in the past, especially in the area of guards, fits much better with the brand image of the gGmbH (see Analysis 2) than outsourcing, e.g. to a security company. The common denominator of these activities is direct contact with the public. This advantage more than compensates for the additional organizational effort/outlay in the field of personnel.

In the fields of "Security" and "Construction and Dismantling", there is no direct customer contact and, in METRUM's experience, a high quality of support can be ensured in the "Switchboard" area through good briefing – which is why outsourcing is an option here.

**Financial Requirements:** As this recommendation largely continues well-founded previous practice, there is no obvious additional requirement to be determined. The entire embedding of service providers and the anticipated costs, for instance for insourced guard positions, are relevant topics as part of the gGmbH's business planning but were not the subject of the OR.

## **F) Implementation Outlook**

In line with METRUM's assessment, the recommendations can be divided into two categories:

- Firstly, those upon whose implementation the General Manager of the gGmbH can decide independently – e.g. Ombudsman's Office, optimization of core processes.
- Secondly, those upon whose implementation the governing bodies of the gGmbH (Supervisory Board and Shareholders' Assembly) must decide – e.g. optimization of governance, adjustments to the Organizational Chart associated with costs.

For the first category of recommendations, METRUM will begin close coordination with the General Manager as early as fall 2023. Based on the decision on how to proceed, METRUM will provide support during implementation, add details where necessary and contribute to the planned implementation via regular inquiries. This implementation support will continue into the second half of 2024.

For the second category of recommendations, METRUM is available to the bodies and General Manager of documenta und Museum Fridericianum gGmbH at any time so as to support the decision-making process and facilitate implementation. The many drafts already prepared as part of the process – for instance for new Articles of Association or new Rules of Procedure for the General Management – can serve as useful starting points, but they still need to be revised in dialogue with the decision-makers.