Running a Museum

The Trainer's Manual

ICOM
INTERNATIONAL COUNCIL OF MUSEUMS
CONSEIL INTERNATIONAL DES MUSEES

UNESCO

The Trainer's Manual:

For use with

Running a Museum: A Practical Handbook

by

Patrick Boylan and Vicky Woollard
City University London

2006

The Trainer's Manual:

For use with Running a Museum: A Practical Handbook

By Patrick Boylan and Vicky Woollard

Contents

Introduction

1.1. Using *Running a Museum: a Practical Handbook* in museum training and career development

The 231 page book, Running a Museum, (Boylan, 2004), was developed by the International Council of Museums (ICOM) in 2004 at the request of UNESCO's Intergovernmental Committee for the Safeguarding of the Cultural Heritage of Iraq, which had identified the need for a manual that could be used in several different ways as part of the Iraq reconstruction programme. Produced with the support of the United Nations Development Group Trust Fund, Running a Museum brings together twelve different themes into a single book, originally published in English and Arabic editions. It was planned for use by trainers and trainees in a range of courses on a range of museum subjects, as a useful tool and reference book for those already working in museums, as a reference source for more in-depth study of more specialised themes, and to inform non-specialists such as elected government members and officials about good practice and the basic needs of museums.

However, even before the first edition of *Running a Museum* was printed, it became clear that the publication would be of interest and value far beyond Iraq. Therefore UNESCO agreed to make it available to all museums in the Arabic-speaking world, as well as more widely in the case of the English edition, and the enthusiastic reception of the initial versions has led UNESCO to agree to the production of a French edition. Since then there have been approaches from other parts of the world asking permission to publish translations into other languages, because *Running a Museum* uniquely brings together in a single volume all the key aspects of the operation of a museum which is seeking to serve the needs and hopes of both its museum visitors and its much wider community in the 21st century.

The twelve *Running a Museum* themes, and the sub-topics within each, are:

The role of Museums and the Professional Code of Ethics (by Geoffrey Lewis): background to collecting; the first public museums; minimum standards & professional ethics; managing the museum; making and maintaining collections; interpreting and furthering knowledge – accessibility; appreciating and promoting the natural and cultural heritage; public service and public benefit; working with communities; legislation; professionalism.

Collections Management (by Nicola Ladkin): developing a collections management policy; acquisition and accessioning; deaccessioning and disposals; numbering and marking of objects in the collection; loans condition reports; collections storage; handling and moving collections; photography; insurance; public access to collections; display and exhibition galleries and rooms; research of collections.

Inventories and Documentation (by Andrew Roberts): long-term loans and accessioning; inventory control and cataloguing; syntax and terminology; object numbering, labelling and marking; location and movement control; backlog accessioning, inventory control and cataloguing; manual and computer-based cataloguing and retrieval; images; web access to the information about the collection; staff and financial resources; recommended cataloguing fields.

Care and Preservation of Collections (by Stefan Michalski): deciding priorities and assessing risks; reducing future loss and damage in 100 years or more; classifying risks to collections; the nine agents of deterioration; the collection preservation cycle: step 1: check the basics - step 2: survey the risks - step 3: plan improvements to collection risk management; examples of specific risk assessments and individual solutions; integrated risk management of pests (IMP); integrated, sustainable risk management of lighting, pollutants, temperature, and humidity; museum lighting guidelines; museum temperature and humidity guidelines; museum pollutant guidelines; integrating management of all four agents.

Display, Exhibits and Exhibitions (by Yani Herreman): types of displays; the object: interpretation within the exhibition context; exhibition management in relation to other museum activities; design: the basic planning and designing process; creating the planning brief; developing the exhibition; production and materials; completing the exhibition; evaluating the finished exhibition.

Caring for the Visitor (by Vicky Woollard): the benefits for museums?; what are the underpinning principles for providing quality visitor services; some key issues to consider in developing a visitor services policy statement; defining and understanding the visitor; types of visitors and their needs; planning and managing visitor services; specific areas for attention; checklist from the visitors' point of view.

Museum Education in the Context of Museum Functions (by Cornelia Brünighaus-Knubel): collections and education; developing and managing museum education; museum education and the community; designing educational programs: the basic principles; choice of teaching and learning methods in museum education; museum publications; types of didactic material commonly used in museums; extra-mural activities; informal education.

Museum Management (by Gary Edson): management structure; teamwork; leadership styles of directors and other senior staff; building a mission statement; financial management; six rules for planning a budget; museum ethics and management; the planning process; issues to be considered; evaluation; SWOT analysis.

Managing People (by Patrick Boylan): understanding personnel management; the main categories of museum work and museum employees; personnel information, involvement and fairness; recruiting and retaining high quality staff; recruitment and promotion selection methods and approaches; minimum requirements for a statement or contract of the terms of employment; staff management, training and professional development; disciplinary and grievance procedures; health and safety at work; how to assess risks in the workplace: five steps in risk assessment.

Marketing (by Paal Mork): introduction to marketing; the current orientation of museums in relation to marketing theory and practice; product, price, promotion, place; strategic market planning; mission and vision; internal and external factors; target groups; promotion; advertising; public relations; building a museum "brand".

Museum Security, including Disaster Preparedness (by Pavel Jirásek): implementing the strategic plan for museum protection; measures to ensure security in display and exhibition rooms; intruder detection system (IDS); access control system (ACS); closed circuit television (CCTV); automatic fire detection and alarm system (FAS); the emergency plan

Illicit Traffic (by Lyndel Prott): prevention; inventories; Object ID checklist; national legislation; tourists and visitors; training; detection; recovery; international co-operation; International Conventions; recovery where the Conventions do not apply; litigation.

The aim of the *Trainer's Manual for Running a Museum: a Practical Handbook*

The Trainer's Manual: for use with Running a Museum: A Practical Handbook has now been produced by the International Council of Museums (ICOM) at the request of UNESCO to supplement Running a Museum and to assist and guide those who are using it as a core textbook in museum training. This *Trainer's Manual* aims to help those organising, running or contributing to training and staff development programmes of all kinds.

It is very important to understand that (in accordance with UNESCO's original proposal for it), *The Trainer's Manual* is intended to be used at all times along with copies of *Running a Museum: A Practical Handbook*. Except for the sample Worksheets this *Manual* does not repeat or duplicate any technical

information, advice or other text that the trainers and students should already have in front of them in *Running a Museum*. Across its 12 chapters the main book, *Running a Museum*, covers more than 130 different topics, each of which could form the basis of at least one training session theme, discussion or practical exercise.

At one extreme, the book as a whole could serve as a study guide or textbook in one year or even two year postgraduate museology or museum or heritage management course. More typically it can be used to guide courses and extended training programmes in relation to one particular area of museum work, such as the model course outline on the theme of "Developing an Effective Visitor Services Team" which would total the equivalent of an intensive course of perhaps three weeks' full-time study or, much better, a series of half-day or day session over an extended period of up to a year. At the other extreme just a single one of *Running a Museum*'s 130 topics could be used as the basis of a short workshop or staff discussion session of just an hour or two. In between, these three options there are almost unlimited possibilities for using Running a Museum in museum and heritage professional education, training and life-long career development. (See Using *Running a Museum* below for a more detailed consideration of this.)

Many years ago one of the greatest pioneers of modern science teaching and learning described the student's response to the three main approaches to teaching and learning in the following words: "I am told: I forget. I read: I remember. I do: I understand." Reflecting this, the approach adopted in this *Trainer's Handbook* is to stress the need for training and staff development programmes to make the fullest possible use of action-centred practical learning. It seeks to show both those very experienced in museum training and those new to it ways that the information and the many practical examples and exercises included in *Running a Museum* can be used in training and staff development programmes of all kinds. In addition professionals and students who are using the main text largely or wholly for private study as part of their own self-development may also find parts of this *Trainer's Manual* such as the blank Worksheets of practical value.

Staff cooperation and team-working

Running a Museum is at least in part based on the principle that the different employees of every museum need to co-operate and work with each other as a team, and to quickly develop an understanding of the work and responsibilities of everyone else working in the museum. In the contemporary world the staffs of museums and related heritage institutions and organisations are becoming increasingly complex and are covering a growing range of specialisms.

Some of these are very likely to be from outside the traditional museum profession altogether, such as the staff working in, for example, financial and personnel management, marketing and public relations, and the increasingly complex areas of security and safety. Many of the staff working in these functions will not have had a traditional education or training within the museum sector, and may very well move on to exercise their professional or technical skills is a quite different field within a few years.

It is therefore strongly recommended that any training activity or programme should involve as wide a range of museum staff and specialisations as possible, so that each group can exchange information and views on their own roles and experiences, whether within the museum profession or more widely. Bringing together, for example, curatorial and administrative or public relations staff, with education and security staff into mixed study or project groups can strengthen the institution overall through increasing knowledge and understanding of other parts or activities of the museum, of its overall objectives and functions.

Similarly, it is very desirable to bring together in such training activities staff from different levels of seniority within the organisation. Older and longer-serving members of staff will always have a great deal of knowledge and experience which they can and should share with less experienced colleagues, while

newer, perhaps younger, staff can bring in knowledge and experience from elsewhere, as well as new perspectives on issues.

Decentralisation of management and responsibility

Another key theme is the trend towards increasing emphasis on decentralising managerial power and responsibility within all organisations to the lowest practicable level within the hierarchy or staff structure, a principle that is now becoming widely accepted within museums and related bodies. Consequently even those in highly specialised areas of museum work, such as curators or conservators, need to have a much broader understanding of and competence in the management aspects of the running of the museum.

The professional and technical education, training and staff development needs of museum personnel of all levels

For more than half a century ICOM has insisted that all specialist employees of museums need relevant professional and technical education and training (*Running a Museum*, page 149 - English text). Initially this advice was focused mainly on the needs of specialists such as curators, conservator-restorers, and later museum education and interpretation personnel. However, in 1981 ICOM's International Committee for the Training of Personnel (ICTOP) at its annual meeting in Bergen, Norway, offered guidance on the training needs of the whole of the staff of any museum or related institution or organisation, arguing that:

> "The staff of a museum may comprise a wide range of specialists or general personnel at many levels other than curators, including administrative and financial personnel, specialised conservation and restoration staff, education specialists, technicians, craftsmen, and maintenance and security personnel. It is the responsibility of each museum (or in appropriate cases regional or national museum authorities or organisations) to analyse the responsibilities and training needs of all kinds of museum personnel, and in the light of such studies to establish learning goals and training arrangements appropriate to each post.

> "The nature and length of training that should be provided in particular areas or for particular jobs will vary greatly according to the special responsibilities of each job. However, there should be a common overall objective of such training: to give individual museum workers an understanding of the museum's role in society, and an understanding of their own roles in the museum." (ICTOP 1983, p.41)

In relation to the last point i.e. that every employee needs to understand their own role in the museum, it was argued that it is almost a basic human right that every employee should understand the objectives and nature of the organisation and programme that they are helping to implement, and the importance of their own role within this. Information and training on this point is probably especially important for the growing number of specialists in areas such as finance, personnel, marketing, computing and information services and security who will probably have been recruited direct into middle or senior management grade positions within a museum because of their special training and skills in the business world or other sectors of the public or voluntary service. It is also important that everyone has an understanding of the job of their immediate boss or supervisor, and of any subordinate staff for which the museum worker is supervising. ICTOP's Bergen guidelines continued:

> "Therefore it is recommended that any training programme should attempt to answer the following questions:

> 1. Museums - why do we have them and what is their function in society?

2. Collections - how do we get them, how do we study and care for them, and what do we do with them?
3. Administration - who does what in the museum and how do they do it?
4. Exhibitions and other public services - why do we have them, how do we organise them, and how are they used?
5. Physical facilities - how do we provide maximum access to museum facilities while safeguarding the collections?" (ICTOP 1983, p. 41 - 42)

ICOM, through its International Committee for the Training of Personnel (ICTOP), has continued to develop recommendations on policy and practice in relation to museum training and staff development, which are reviewed and updated from time to time. The latest development of these is summarised in ICOM's Curricula Guidelines for Museum Professional Development and supporting guidance, all of which can be accessed through ICTOP's website at http://ictop.icom.museum/ . This website also has many other valuable practical resources for all interested in museum training and professional education, including on-line publications by leading experts in the field and a directory of websites of museum training courses around the world.

Designing and planning training and staff development programmes

In the Introduction to *Running a Museum* it is suggested that the Handbook can serve several purposes, with all the detailed information and advice on current "best practice" being of practical value:
1. to new or future museum professionals with minimum experience so far of running a museum;
2. to experienced professionals and technicians in one of the many specialised areas of museum work by explaining to them about the responsibilities and work of their colleagues in other departments and specialisms;
3. as a valuable resource in the very necessary internal discussions among staff and governing authorities about the current performance and the future policy and direction of their own institution.

Using *Running a Museum: A Practical Handbook* in training and staff development programmes

Running a Museum is intended to be used in training and staff development programmes in many different ways. Examples include:
1. The book as a whole could be used as a core textbook in university level postgraduate professional courses or degree programmes in museology, museum studies, heritage studies or related subjects for future museum professionals.
2. Similarly it could be used to guide part-time and distance learning programmes for existing museum employees.
3. A museum could use it in its own internal staff development and training programmes, while an individual museum worker is likely to find much of value in relation to their own private studies and professional development.
4. The different chapters and themes have valuable information on current progressive museum "best practice" and values, which might usefully be discussed within the museum and indeed with its governing body in the course of establishing and revising the aims and objectives of the museum and of its future policies and programmes.
5. Each chapter in *Running a Museum* covers a topic of major importance, and could guide a specialist course or perhaps a series of practical workshops on that particular theme, such as Collections Management or Museum Security. A model course programme linked to the Caring for the Visitor chapter of *Running a Museum* has been included as section 3.1. of this *Trainer's Manual*.

6. Similarly, a single one of the more than 130 sub-topics from that various chapters might be used as the basis of a day or half-day practical workshop or discussion session for existing staff.

This *Trainer's Manual* provides additional guidance for everyone who is organising or helping to deliver training, whether or not they are themselves specialist trainers or educators in the field. For example, experience shows that specialist museum training can be delivered very effectively by experienced professionals with practical experience in the subject concerned, but they may not be experienced in organising and running training programmes and courses as such.

In each chapter of this *Manual* you will find that the main text is supported by both supplementary information, including for example key technical data and standards, and suggestions for practical exercises and discussion topics for internal use, whether by an individual professional, a small study group, by participants in a training or staff development programme or exercise, or by the whole of the staff.

The next section of the *Trainer's Manual* therefore gives advice and information on teaching and learning approaches that can be used in museum training and staff development programmes of all kinds, together with practical guidance on organising and running such courses and programme.

The remainder of the *Trainer's Manual* consists of a brief commentary on each of the twelve chapters in *Running a Museum*, highlighting themes and topics of special importance, suggesting practical exercises that might be included in the programme. An important feature of *Running a Museum: A Practical Handbook* is the inclusion of many information "boxes" and suggested practical exercises for group or individual work. In this *Trainer's Manual's* commentaries on each chapter we have included one or more blank worksheets based on these, printed so that each can be easily copied by the teacher or trainer for distribution to the trainees or study groups to guide their responses to the practical exercises suggested.

The structure of each main chapter of this Manual follows the same pattern under the following side headings:

Who? in each case this section summarises who within the staff of a museum require particular forms and levels of training in relation to their functions and responsibilities;

What? this section highlights possible priority themes of the corresponding Running a Museum chapter which might be highlighted within a training or staff development programme;

How? this offers advice on practical ways in which such training might be organised and presented, and who might be asked to assist with the training;

Supplementary material:

Model course: In support of the main chapters, the *Trainer's Manual* includes an example of a fully developed programme and trainer's notes for a specific course based on the equivalent chapter of *Running a Museum:* and in-service training course on Developing an Effective Visitor Services Team.

Worksheets for photocopying: Based on the related section of *Running a Museum*, this book ends with 36 model Worksheets which could be used by trainees and other course participants on courses and practical workshops, particularly when the trainees are undertaking either group work or individual projects. The authors hope that these will serve as models for other Worksheets based on other sections of the book, which trainers can prepare as needed.

1.2.   You the Trainer: Understanding Teaching and Learning

This introduction is for you, the trainer organising or contributing to a museum training programme. You are central to the development of the museum and its staff in your role as facilitator, guide and mentor. Through the use of the Manual you will be providing a wealth of opportunities for all staff to explore and learn from the workshops and each other. You will be key to creating a positive learning environment that can give confidence to individuals in the way they carry out their tasks and how they develop themselves. Finally your work will inform the way in which the museum goes about its responsibilities to its collections and to its visitors, making their experiences fulfilling and themselves keen to return.

The aims of this chapter are to:

> set the framework for a learning ethos within the museum which underpins the professional development of all staff
> set in place the stages to establish an integrated annual staff training programme that supports the full range of the museum's activities
> look at how adults learn
> enable you to develop a set of skills and knowledge to deliver these exercises in an effective and enjoyable manner
> consider the practicalities of organising and leading training workshops;
> offer a range of evaluation techniques to help improve the quality and content of sessions over time.

What is Continuing Professional Development (CPD) and Training?

Training is just one element of an individual's continuing professional development (CPD). This phrase means the process (which requires knowledge and skills) by which the individual improves her/his own professional actions through the working life according to standards agreed by respected others which are believed to be most appropriate and effective in the work place. CPD can be done through shadowing another person, visiting other museums, talking with colleagues, reading journals and attending training days. In fact training days on their own are less likely to be effective than if they sit with a range of experiences / activities that allow the individual to experiment with ideas from the training day, to observe another colleague who has greater experience, to have time to assimilate them into their own work, to reflect on the consequences of their new actions and to bench mark them against other colleagues standards of good practice.

Why engage with training? Developing an ethos within the museum which underpins the professional development of all staff

Training and professional development are crucial for a museum to move forward and achieve its plans for the future. The involvement in training activities helps staff to update themselves with new ideas and technologies and to reflect on and monitor the quality of services offered to its public both in terms of visitors and the various stakeholders including government.

Perhaps most importantly, training and professional development can invigorate individual staff members to contribute to team work, to gain satisfaction from the work that they do and become enthusiastic in being a part of an organisation that shows an interest in their professional needs and ambitions. Organisations that listen to and act upon the experiences their staff has encountered in their day to day work are known as learning organisations.

Learning organisations offer opportunities for staff to develop and take on new responsibilities while providing them with support. They allow staff to try out new ideas and are willing to learn from the

mistakes that are made. They encourage staff to share experiences and expertise among colleagues and to learn from each other through shadowing and mentoring. The benefit for both staff and the organisation is that there is an environment for creative problem solving, an enthusiasm to develop ideas and a greater satisfaction in working and enjoying the results of everyone's efforts.

Where should responsibility for training be located within the organisation?

For the ideas in this manual to have the greatest impact will be due to the seriousness the museum takes training and professional development. You the trainer must feel, and be given evidence to show, that senior management considers training to be central to the organisation and so gives you responsibility and authority to organise sessions and to negotiate with staff to be released from their duties to attend sessions. The museum from the Director downwards can recognise the importance of training through a number of ways. For example in terms of management; by setting aside time for cross-departmental training, providing opportunities for shadowing and mentoring, through encouragement and celebration, by recognising individual members' contribution and participation, and through participation, by acknowledging that all staff, including the senior management team, can learn something new and contribute expertise and knowledge.

Who is the trainer?

First and foremost is the need to name or appoint a member of staff to become the training "Star" for one to two years. (Ideally one would wish for two to spread the work load to offer different training styles and to cover when there are absences). The individual must be someone who has some authority within the museum and whom other staff respect. S/He must be able to demonstrate that they have particular characteristics to be an effective trainer as this role is fundamental to the success of the training programme. Effective trainers are those who are:

> Keen to learn themselves, always wanting to improve professionally, and, who place high importance on self-evaluation
> Always welcoming, positive and encouraging, treating each individual with courtesy and respect
> Democratic in allowing all to contribute equally, allowing no particular individual to dominate unless they have something useful to contribute and which others can learn from.
> Recognise that each individual comes with a valuable experience, skill or knowledge to contribute
> Creative in planning sessions that are stimulating, varied in approach and clear in their aims
> Able to establish an atmosphere of support by reducing the element of threat / failure in terms of lack of knowledge, skills, confidence
> Well prepared in terms of information, materials, tasks to do
> Able to listen as well as give guidance
> Willing to be both a facilitator (taking a secondary place) and a workshop leader
> Challenging and stretching people's ideas and solutions
> Good time keepers — both in arriving before everyone else and preparing the room and in finishing on time having accomplished all the tasks.

Planning a training curriculum

The first activity the appointed trainer should embark upon is to carry out an analysis of the current skills, competencies and needs from both individual staff and from the senior management team. The **skills analysis** could include:

> Technical skills: such as computer skills, exhibition/gallery mounting skills (e.g. hanging pictures),
> Management skills – chairing meetings, working in teams, project management, report writing, planning,
> Collection specific skills – documentation, general storage,
> Professional/ personal skills – communication (written, spoken, presentations)

The trainer then establishes those skills that are in most need and draws up a **training plan / a schedule of training sessions** along side the senior management team. In establishing this schedule it is important for the trainer to take a mid to long term (1-2 years) view of the training provision in the museum. So that one can ensure that not too many staff are on training at one time, that priorities are being addressed, that there is an opportunity for skills to be transferred across or downwards through a department and finally that there are finances to support the programme.

It is advisable to plan a series of training sessions (say 4-6 sessions over a period of weeks) so that there is a gradual build up or **progression of skills** – one session leading on to the next – either by going into the subject more in-depth or introducing an associate area of knowledge e.g. planning education programmes links well with marketing or front-of-house services. For example

Content	Session 1	Session 2	Session 3	Session 4
Creating a mission & strategy for the museum	SWOT analysis	Create mission statement	Develop aims and objective	Draft strategy for next 3 years
Visitor services	Current provision	Future goals	Developing a visitors team and responsibilities	Creating benchmarks and monitoring progress
Information and Communication Technology Training	First group receive initial training	First group continue with next stage	First group consolidate key skills	First group members adopt one "student" each to pass on what they have learnt

You will need to think how often you hold the sessions when they are in a series. You need enough time for people to put in place the skills or knowledge gained, but not to leave it too long that everything is forgotten! It is important to schedule an additional session some weeks after the final one to ask people to come back to report how they have accommodated the learning to their particular area of work, or to reflect on why things have not gone as had been anticipated, what has hindered the change.

Evaluating the Training:

At the very beginning of planning the year's training programme you will need to consider how you will evaluate it. You will need to evaluate the programme for several reasons:

> for your professional improvement: your own performance, the structure of the session, materials needed, understanding the dynamics between groups etc.

> to note progression for individuals: for individuals to record their own professional development over time, what sessions they enjoyed and why so they become skilled in analysing their own learning styles and improving their own ability to learn

> to have evidence for senior management: understandably senior management will want to know how the training sessions are contributing to the museum's overall goals. It would be sensible to provide quarterly summary reports which include: number of sessions, number of attendees, topics covered, feedback from attendees, outcomes.

You can collect information in a number of ways:

> through participants having their own training note book/diary or a set of training sheets which record the activities they have done within a year and what has been the outcomes;

> formal interviews - with the use of the training sheet or diary, individual staff can talk about how the training sessions have changed the way they do their everyday activities. This may include the way they organise their day, to be being more time efficient, being

able to delegate more, being able to prioritise, having set up systems for recording information etc.

> your own diary / notebook which records numerical data such as who attended, how many sessions run how many hours etc. as well as your aims and objectives for each training sessions. These aims may well go beyond the noted aims of the sessions given to participants; for example you may wish to experiment with a new activity or space and so recording your thoughts after the event will be useful to check against the feedback from the group.

> Short questionnaires could include the following questions. Sheets like this are good if they are anonymous so that people can be critical if necessary :

Title of training session _____ Date _____

Did you find this session useful for your work?   Yes ___   No ___

If No why?

How will you use the information / skills?

What was the most successful part of the session?

What was least successful?

Was the session: too long _____ about right _____ too short? _____

Thank you for your help

Understanding your learners

Defining learning:

"Learning is a process of active engagement with experience. It is what people do when they want to make sense of the world. It may involve increase in skills, knowledge, understanding, values and capacity to reflect. Effective learning leads to change, development and the desire to learn more" (The Campaign for Learning UK).

Over the past thirty to forty years there has been an increasing interest in how adults learn as previously research had been in the area of children's learning. Through the work of individuals such as Howard Gardner, David Kolb and others, it is now understood that individuals learn in different ways, at different paces resulting in different perspectives and different solutions to problems.

David Kolb (1984) produced a model based on **experiential learning**: experience as the source of learning and development. The basis of the model is the cycle of learning which involves four stages as a part of a continuous process. Kolb suggests that one must complete the cycle if learning is to be successful. He also suggests that we each tend to develop a preference of where we position ourselves in the cycle.

This is known as our learning style: see the chart below.

Process Model of Learning

Do
Concrete experience (CE)

Apply
Active Experimentation (AE)

Review
Reflective Observation (RO)

Learn
Abstract Conceptualisation (AC)
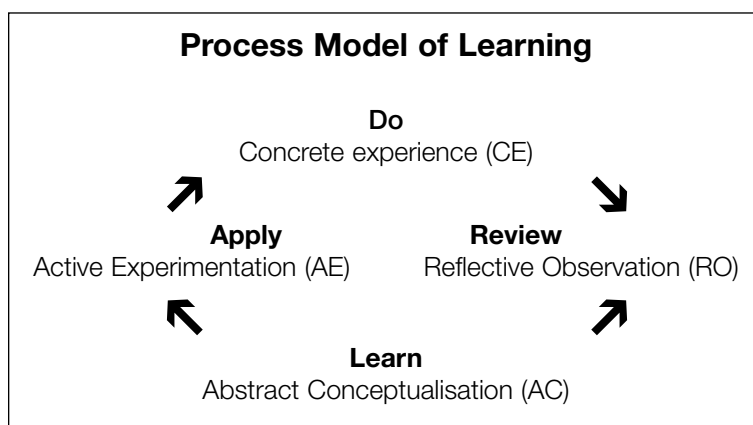
The following descriptions are edited from Mc McCarthy and Pitman - Gelles (1989) chapter in Durbin (1996)

Style 1: Imaginative / Divergent learners CE & RO

> Learn by listening and sharing ideas with others.
> Perceive information concretely and process reflectively.
> Are interested in people and culture. They are divergent thinkers who believe in their own experience, excel in viewing concrete situations from many perspectives, and model themselves on those they respect.

Strength: Innovation and imagination. They are ideas people. **Goals:** Self-involvement in important issues, bringing unity to diversity.
Favourite questions: Why or why not?

Style 2 Analytical / Assimilation learners (RO & AC)

> Learn by thinking through ideas.
> Perceive information abstractly and process it reflectively.
> Are less interested in people than concepts: they critique information and are data collectors. Thorough and industrious they will re-examine facts if situations perplex them.

Strength: Creating concepts and models. **Goals:** Self-satisfaction and intellectual recognition.
Favourite question: What?

Style 3: Common sense / Convergent learners (AC & AE)

> Learn by testing theories in ways that seem sensible.
> Perceive information abstractly and process it actively.
> Use factual data to build designed concepts, need hands-on experiences, enjoy solving problems, resent being given answers, restrict judgments to concrete things, have limited tolerance for 'fuzzy' ideas. They need to know how things they are asked to do will help in 'real life'.

Strength: Practical application of ideas. **Goals:** To bring their view of the present in line with future security.
Favourite question: How does this work?

Style 4: Dynamic / Accommodative learners

> Need to know what can be done with things.
> Learn by trial and error, self-discovery.
> Perceive information concretely and process it actively.
> Adapt to change and relish it; like variety and excel in situations calling for flexibility. Tend to take risks, at ease with people but sometimes seen as pushy. Often reach accurate conclusions in the absence of logical justification.

Strength: Action, carrying out plans. **Goals:** To make things happen, to bring action to concepts.
Favourite question: What can this become?

But what does this mean for the trainer?

Kolb's model helps us recognises that the individuals in a training session will react in different ways to the session's content and its structure. Some will enjoy more the group work, while others will prefer to read the hand outs first. Some will be keen to get on with solving a problem pragmatically while others will want to chat about the ideas behind the task. The consequence of this is to ensure that you have a range of activities in the session so that you are not only favouring one style of learning and that you are

perceptive to the behaviours of individuals when they are in their most preferable style of learning and when they are in their least. For example people beginning to chat when asked to read through notes. Why some are reluctant to go off into the stores to list potential security risks.

There are also a number of factors which need to be considered when preparing workshops and sessions.

Learning takes time – For some it is the application of the abstract concepts in the everyday work place that creates the change in behaviour /attitude/ knowledge. Therefore it is recommended that after a series of workshops it is important for people to return as a group and reflect on that change in order to consolidate it and refine it.

This takes us on to the next factor: **Learning is also about learning how to learn** –

The more people are able to analyse how they learn well, they are able then to seek out the best environments and processes to create the most effective learning.

For many **Learning is a social activity** – thinking in groups, being stimulated by another's ideas, brainstorming to solve a problem. Also for many **Learning is for an identifiable purpose** – adults can be very instrumental in their learning the result of the learning is important to them - Can I improve as a result of this? I will use that knowledge /skills to help me do this? I will learn a new language so I can be understood in that country when I visit it.

Planning and delivering effective sessions

Here are the main elements that should be considered to create stimulating workshops.

The aims of the session: Consider what is it that you want the participants to discuss, understand and tackle during the session and, crucially, what will this enable them to do afterwards. It is far better to have one or two clear aims than expecting the workshop to deliver several unless they are closely linked. It is helpful if these are made clear to participants both at the beginning and at the end of the session, as they will want to know that their time is being spent usefully and there will be a benefit as a result of the workshop. Some sessions in the Manual could have an instant impact on someone's everyday practice; others will need a group to gather and plan a strategy that may take weeks or months to implement.

Planning the session: It is advisable to plan the training session well in terms of the amount of time each part will take, leaving enough time for introductions and conclusions. Set alongside the contents of your session the timings, for example 2:00pm Start, welcome and introductions, 2:10 Aims of the session, 2:15 task 1 in groups, 2:35 feedback and discussion. 3:00pm Task 2 etc. Remember to always start promptly – If you get a reputation for starting late then people will come even later! Always thank those who arrive on time so inculcating an expectation of good time keeping. Check that you have set aside 15 – 20 minutes before the end of the session to bring things to a conclusion. This gives you the opportunity to go over the outcomes of discussions or decisions made and to highlight any tasks/activities that are to be carried out after the session back in the workplace.

Considering the content: The worksheets in the manual are there to give you a structure. But do use your own knowledge of the group and the museum context to add anything that is particularly relevant to the theme of the session; for example to include an opportunity for a member of staff to discuss a problem for the group to help solve. Be thoroughly prepared for your session – take time to plan your notes, think about the order in which the information or tasks are given: is there a logic? Do participants have to have some knowledge or information before they can tackle the task ahead?

Structuring the session: Make sure that you are offering a range of activities for the participants to do within the session. Sessions usually run from 1? - 3 hours. People will find it more difficult to pay attention and be actively involved if there is only one person talking throughout. Activities can be: People working on their own, in 2s, 3s or groups of 4. To discuss a problem and, finding solutions, creating a list and prioritising the key elements, making a group presentation, going into the galleries to do observation and reporting back to the group. You can get people to change groups should there be more than one group activity in the session. If the session is over 1? hours it is advisable to allow for people to have a short break (10 minutes) to stretch their legs etc.

Prepare your materials: Will participants need to write things down? Have you got enough pencils/pens? Have you got additional copies of notes just in case some extra people turn up? Do you need a Flip Chart or blackboard to write down particular points individuals or groups have made in their feedback? Will you or others need a slide projector or an overhead projector? Have you checked that all the equipment works half an hour beforehand?

Preparing the training space: Wherever you choose to place the training session your aim is to ensure that the space is an appropriate environment to learn in a positive and productive way. People need to feel comfortable so they can put all their attention on the content of the session and any activities involved. Hence check that the room or space has suitable seating and tables that can be moved into different patterns e.g. rows, groups, horseshoe or circle. Each of these patterns creates a different dynamic: for example circles ensures that everyone's view is equal to another's; in rows facing the front has the trainer as teacher and authority; a cluster of chairs facing inwards encourages group work. Make sure there are refreshments available and the temperature is reasonable and can be easily controlled.

Do take every opportunity to hold sessions in different parts of the museum especially where the topic demands it; for example working in the galleries for discussing exhibits and displays, education and visitor services. If there is a space available in the museum stores take the opportunity to hold sessions there as it allows non curatorial staff to see the collections and understand the complex issues to do with atmosphere, packaging, security and location.

Be creative and respond to the range of areas the museum covers. For example when considering visitor services perhaps it would be worthwhile in going to a local hotel that has a good reputation for looking after guests to discuss what are the key factors in their success. Another example would be for Education staff to visit local schools and community groups to learn more about those particular groups' needs. Involving other organisations in the training programme offers you a wider range of spaces, helps to develop new partnerships and draws attention to your emphasis on staff development.

Understanding the participants: Always find out information about the participants that is relevant to the training session. For instance will there be people from different departments of the museum? – if yes this may well mean that not every one is clear about the roles and responsibilities each has, there may well be prejudice about that work, as being less relevant or easier to carry out which may not help the group dynamics. You can find this out by asking people to sign up for the training sessions a couple of days in advance or at the beginning of the training session when people introduce themselves. Asking people to introduce themselves, even if everyone is known to each other, is a good opportunity to get people to add a sentence or two that links them to the session. For example if the session is on security to ask them what have they each done to reduce risk in their area of work, thus getting everyone one to think positively and that they all can have equal responsibility in reducing the overall risk to the museum.

Managing the session: Even if you are being the facilitator and allowing the participants to lead parts of the session in terms of giving feedback or giving a presentation, you will be expected to ensure that the

session is running to time, is orderly and that all have a chance to contribute. There are some tips that will help this role.

Giving people clear instructions: Each session can be introduced by giving the programme timetable for the session by handing out a sheet of paper or writing on the board or flip chart. This ensures everyone understands the format of the session and how it is balanced in terms of activities, presentation etc. If you are asking people to break up into groups with a specific task, check that everyone understands, then go round each group to check again that the task is understood and they are already tackling the problem. Always give people the amount of time you are expecting them to complete the task by. Then another warning say 3 minutes before you expect the task to be completed and give feedback. If you are asking people to give feedback, remind the group to appoint someone to gather the information and to put it across to the other groups in a coherent manner

Using body language: We can express a great deal though body posture: how we stand or sit, use our arms, eyes and face. These movements can help control a situation. By walking around the room, by standing near to an individual, by scanning across the room or focusing on an individual we can include people, emphasize a comment or indicate that everyone needs to come together to listen. For example if someone continues to talk too long, walk near to them and place you hand on the table and look at them and say "Thank you that is very interesting, perhaps we can hear more about that in the break or afterwards, however we must get on with the task".

Creating group consensus: This is a very useful device when wanting to get a group consensus say over the priorities for the next three years. The group is posed the question written on the Flip chart for example "What artefacts should the museum be collecting in the next three years?" Each person writes down a list of the types of artefacts they believe the museum should collect. The trainer goes around the group one person at a time asking each person to mention one item on their list. This is written up on the board, but without the individual promoting their choice. If others have the same item on their own list they cancel it out. The trainer continues going round everyone again until all the items are up on the main list. Then each person is allowed to select their top five items by scoring 5 points the one they think the most important , 4 to the next and so on, 3,2,1. The Trainer then goes to each person and asks for their choice and adds the numbers along side the items. When this has been done across the group, each item has the number of counts added up. This will then create a list that all have contributed to and which has the key items prioritised, e.g.:

> Traditional costume 2, 4,1,3,5 = 15
> Children's toys 1, 1,4,1,3 = 10
> Woven baskets 4, 5,4,2,4 = 19
> 17th century sculpture 2, 4,3,5,1 = 15
> Oral history of agricultural workers = 4, 4,2,1,1, = 12

Reporting back: Getting groups to report back has many advantages: Sharing good ideas, hearing different perspectives, opportunities for people to practice their public speaking, bring the session to a conclusion. The trainer also needs to recognise the importance of adding comments at the end of each group's feedback and as a final conclusion; by drawing out common themes, new thinking and prioritising tasks. Do make sure that the notes made are written up and form a training archive, which can also go on the intranet or form the basis of the next session.

So off you go with your training manual, your personal notebook, your flipchart… Good Luck!

Advice on using each chapter of *Running a Museum: A Practical Handbook* in training

2.1. Training in The Role of Museums and the Professional Code of Ethics

Who?

All museum staff should have an understanding of the history, purpose and present-day role of the museum. Training and career development guidance is also needed in relation to the ethical values and rules that guide the museum's operations, is needed by everyone working for, or helping to govern or control, the museum. This requirement applies not just to every member of staff, but most probably to many others who are not on the museum's staff. Those outside the paid staff who need to understand what the museum is doing, and the ethical basis of its work would certainly include those serving on museum governing boards or committees, since these will need to ensure that important decisions, for example, about the authorisation of additions to the collections (to take just one example), are made in accordance with the agreed ethical standards and rules. Training, whether formal or informal, may also need to be extended to cover the key officials in relevant policy and funding organisations such as the government ministries or local government departments responsible for the museum.

What?

This chapter of *Running a Museum: a Practical Handbook* provides a great deal of information, advice and staff training material covering the background to collecting, the emergence of the first public museums, minimum standards & professional ethics, managing the museum, making and maintaining collections, interpreting and furthering knowledge – accessibility; appreciating and promoting the natural and cultural heritage; public service and public benefit; working with communities, questions relating to legislation, and a discussion of the concept of professionalism. The relevant section of this chapter of the book can be used as the basis of either a single workshop or seminar or as part of an extended course covering many or all of these topics.

The level and kind of training in these subjects will vary greatly according to the detailed duties and level of responsibility of the individual concerned. However, every staff member should have at least a basic introduction to the history and aims of the museum so that they can relate their own work to the overall objectives. Those in regular direct contact with the visitors or the wider public will need a greater knowledge and understanding of these questions, even where those staff hold what may be regarded as very junior positions, such as those working on the reception or information desks, telephone switchboards, or as exhibition hall or gallery security attendants or guides.

More senior staff, and all those concerned with acquisitions to and the care of the collections, such as curators, registrars, field research and collecting personnel and conservator-restorers will all need to be very familiar with the Code of Professional Ethics (reproduced as an Appendix to *Running a Museum*), as well as relevant international and national laws and regulations (see also the *Illicit Traffic* chapter), and with the museum's own policies and rules relating to the acquisition, documentation and care of collections. Staff working in areas relating to the museum's public services will similarly need to understand the ethical guidance and policies relating to their own areas of work and special responsibility, while specialists in fields such as administration, marketing and public relations, exhibits and displays or museum security will also need relevant information and training.

Most of all, since ethical values must underlie all of the museum's work and actions, it is essential that the director, other senior management and professional staff, and - not least - the governing board or other authority both understand and are completely committed to the museum's agreed policies, not least its publicly declared ethical policies.

How?

While it is clearly important that staff are given full information about these important matters, here as

elsewhere in any training programme there needs to be a variety of approaches. Lectures and talks to communicate important information are often necessary, at least as introductions to a particular subject, for example in the case of this chapter, the history of a particular museum or of the museum system in a country. However, even in this field, action-based learning is usually more effective.

If a particular course or workshop has a range of staff of different types and levels, and with different lengths of service and experience within the museum, then get the different group members to speak to colleagues about their own knowledge and experience, or about the role of their department or section within the institution. In the case of a course spread over a period of time, individuals or small groups could be asked to research and report back to the whole class on a particular topic, perhaps relating to the history of the museum, or of a special collection or programme within it. If a particular course within this field has museum personnel from more than one museum, or perhaps several countries, then the perhaps very different traditions and experiences can be explained and debated.

Regular feedback and discussion of this kind is even more relevant and important when considering the question of museum ethics. Staff will be "learning by doing" as they deal with professional and ethical problems and questions in their day to day work, so encourage them to share the experience of real cases and dilemmas with colleagues. The discussion of case studies on ethical problems is also of great value. This chapter of Running a Museum offers five such case studies, and these have been reproduced in this Trainer's Manual as two Worksheets for copying and distribution.

To mark both its 60th anniversary and the 20th anniversary of its first Professional Code of Ethics in 2006, ICOM is planning to publish further case studies (based on actual issues considered by its Ethics Committee over the past 20 years, but with names and other details removed) and a study of the history and evolution of the concept of museum ethics through the 20th century. To keep up with these developments both training organisers and students should regularly check the ICOM ethics website: http://icom.museum/ethics.html for the latest developments and updates of both general and training material.

Also, the international not-for-profit Museum Security Network of Dutch museum security expert Ton Cremers (ex Rijksmuseum, Amsterdam) Ton Cremers provides a daily monitoring service of world press coverage of museum, libraries, archives and heritage security news, illicit trafficking, and related ethical issues, often with much detail of cases that could provide invaluable additional case material for discussions of acquisition policy and practice, as well as wider security and safety matters, in museum training. Its daily e-mail circulation: Museum Security Network Mailing List - often carries as many as ten or even more stories a day. Subscription to this is free: both the web archive with all listings from April 2003 and the sign-up link for the e-mail news are at: http://www.museum-security.org/

Sample Worksheets for photocopying relating particularly to this chapter:
> **1. Professional Code of Ethics Case Studies 1, 2 & 3**
> **2. Professional Code of Ethics Case Studies 4 & 5**

2.2. Training in Collections Management

Who?

The often large and complicated collections are a vital part of the resources of most museums, and the proper care, management and development of these is a most important responsibility, which affects in one way or another just about every employee of the museum. Clearly, specialist staff training and regular updating in all aspects of good collections management practice is of central importance to those employees (and researchers) whose jobs are primarily related to collections, such as curators, registrars and documentalists, conservators and restorers, and collections managers. However, it is most important that there should be some training in relevant key aspects of present-day collections management practice and standards for everyone on the staff, including the director and senior management and security personnel in particular.

What?

This Collections Management chapter of *Running a Museum: a Practical Handbook* covers a wide range of important topics, all of which can be used in training and staff development programmes including: developing a collections management policy; procedures for acquisition, accessioning, deaccessioning and disposals; the numbering and marking of objects in the collection; loans condition reports; collections storage; handling and moving collections; photography; insurance; public access to collections; the use of the collections in display and exhibition galleries and rooms; and collections research. The relevant section of this chapter of the book can be used as the basis of either a single workshop or seminar or as part of an extended course covering many or all of these topics.

Specialist professional and technical staff who work on collections as all or part of their work will, of course, need a thorough understanding of most if not all of these important topics as part of their professional education or initial training, as well as regular refresher courses and updating on these topics. The director and senior management staff also need to understand both the principles and policies of the museum itself, and of "best practice" more widely, in relation to collections management principles and priorities.

Everyone else who from time to time may be involved in the handling or moving of specimens or works of art, including porters, security guards, museum education personnel, display and exhibits staff, and technical personnel such as photographers and illustrators must have training and regular updating in the correct and safe handling of the different kinds of object in the collections. Education, display and related staff also need to understand the museum's system, rules and practice for the catalogue numbering of objects so that these can be correctly identified and placed or replaced in the collections or storage. Building maintenance and security personnel also need to be aware of the principles and practice of good collections storage, and the proper management and supervision of controlled access to both the collections storage and in the displays.

How?

While good collections management does depend to a considerable extent on underlying principles which can be taught in lectures and theoretical demonstrations, this is to a very large extent also a very practical subject. Therefore so far as possible the training for all staff levels and specialisations should be based very much on a practical "hands-on" approach. This is obviously essential in relation to practical skills such as the safe handling and moving of specimens, or the correct numbering and marking of objects. But supervised practical experience and the preparation of case studies can also be used in many other areas of the topic, for example by researching and writing up condition reports, or collections management policies and rules on, for example, access to the study collections.

This is a field in which standards and techniques are developing rapidly, so it is important that the museum establishes and maintains good links with other institutions, both at home at internationally. Visiting experts may well be able to lead short practical workshops with the museum's staff as part of the training programme. Similarly the museum's own specialist staff should be encouraged to communicate their knowledge and practice to other members of staff, for example in providing training in the handling of specimens and works of art for the museum's security, display and technical staff.

Sample Worksheets for photocopying relating particularly to this chapter:
   3. Drafting a Collections Management Policy
   4. Cataloguing Procedure Policy
   5. Policy on Security of Collections

Worksheets designed primarily to support some other chapters of *Running a Museum* may also be of value in training programmes based on this chapter.

2.3. Training in Inventories and Documentation

Who?

There can be big differences from one museum to another, and particularly from one national tradition to another, in the way in which the documentation of the collections is organised and staffed. In many traditions, cataloguing and related documentation has usually been regarded as a core responsibility and activity of the curators of particular collections, and it is not uncommon to find that, historically at least, quite different approaches, perhaps even different numbering systems, have been used in different departments of the same museum. In other cases, specialist staff, often called registrars or documentalists, have for many decades been responsible for creating and maintaining a central catalogue of all the collections of the museum, or perhaps even a national inventory of all the preserved cultural heritage (as in the case of France, where the national inventory including the collections of all public museums, is now more than 210 years old).

More recently, with the increasing use of computers in museum documentation, a third staffing model has emerged, in which the museum has an information communication technology (ICT) department or section, which provides professional and technical advice and support to whoever is responsible for the inventories and documentation, whether curators or registrars/documentalists, as well as advising the director and senior management in the use of ICT more generally within the museum. Sometimes the ICT staff may not even be employed directly by or for the museum, but may be part of a larger government (or other public service) computing service, or indeed may be employed by an independent contractor engaged to provide documentation or wider ICT services to the museum.

Whatever the policy and staff organisation, those staff members (or employees of computing services or contractors) who have significant responsibilities for any aspect of cataloguing and documentation need to have specialist training in these fields. Other staff will also need training so that they have a sufficient understanding of the inventory and documentation policies and practices of the museum in relation to their own duties. For example, even if the museum has a specialist documentation department responsible for this field, curatorial and other staff responsible for acquisitions (e.g. field research and collecting staff) or collections management will still need a good understanding of this field.

Also, very obviously the director and senior management of the museum must also be fully aware of both policies and current practice, as well as the importance of giving high priority to establishing and maintaining adequate inventories and documentation for both ethical and - not least - legal reasons.

What?

This chapter of *Running a Museum: a Practical Handbook* covers: long-term loans and accessioning; inventory control and cataloguing; syntax and terminology; object numbering, labelling and marking; location and movement control; backlog accessioning; manual and computer-based cataloguing and retrieval; images; web access to the information about the collection; staff and financial resources; recommended cataloguing fields. The relevant section of this chapter of the book could be used as the basis of either a single workshop or seminar or as part of an extended course covering many or all of these topics.

The Inventories and Documentation chapter of *Running a Museum* gives a wide-ranging survey of all the key issues that needed to be covered in the training of all staff with special responsibilities in this field, whether curators, specialist registrars or documentalists or computing and wider ICT personnel. Again, there is no substitute to gaining practical experience, both of the museum's own systems and procedures, and of "best practice" elsewhere.

Where those attending the course or workshop are coming from more than one museum or organisation, each participant should be asked in advance to bring with them information on the inventory, documentation, terminology and numbering systems and procedures in use in their museums, together with examples of the registers, forms or cards being used, for comparison and discussion.

All personnel with collections-related responsibilities need to be competent in processing acquisitions, cataloguing and inventory control, object numbering and labelling and location/movement control, and courses and workshops should be planned to cover all of these key areas, with a strong emphasis on gaining practical experience in these (and other areas of documentation work. Also, since the Internet, and particularly websites, now provide very important sources of information and advice on documentation policies, standards and procedures, especially those of the ICOM International Committee for Documentation, the Object-ID system for describing objects and the Museum Documentation Association.

It is also important that everyone involved, both trainers and course participants, understand that there have to be close co-ordination within the museum between documentation work (and training) and closely related fields. Managing Collections, Security and Illicit Traffic are the three most obvious , but there are also important issues relating to some aspects of the work covered by the Display, Exhibits and Exhibitions chapter also, particularly relating to the documentation and inventory control of loans to and from the museum for temporary exhibitions.

How?

Where a training course or workshop etc. is intended for the staff of only one museum or similar institution or organisation there should be an adequate supply of copies of the institution's own documentation stationary etc., for examples accession registers, and catalogue or index cards. Where the museum has a computerised documentation system this should at the very least be demonstrated to course or workshop participants, and wherever possible all should have the opportunity to use a demonstration system, though probably not the main catalogue system, so that this cannot be corrupted by incorrect test inputs. As a very minimum course, photocopies of screen images from the museum's computerised system should be available for participants.

Where those attending the course or workshop are coming from more than one museum or organisation, each participant should be asked in advance to bring with them information on the inventory and documentation systems and procedures in use in their museums, together with examples of the registers, forms or cards being used. Each participant, or at least one representative from each museum represented, can then be asked to make a short presentation summarising their arrangements. After discussion of these presentations, practical work could then be carried out trying out these different systems.

In this area of museum work in particular, there also needs to be an especially strong commitment to frequent re-training and updating, because this is a fast-moving field due to both the rapid expansion of the use of computer-aided systems within museums, and the astonishingly rapid speed of computing developments generally. (The average effective life of a computer or a software program before it becomes virtually obsolete due to further technical advances is currently five years at the most: many would argue that it is significantly less than this.)

Sample Worksheets for photocopying relating particularly to this chapter:

      6. **Reviewing the Museum's Cataloguing and Documentation**

      7. **Web Information Resources**

Worksheets designed primarily to support some other chapters of *Running a Museum* may also be of value in training programmes based on this chapter.

2.4. Training in Care and Preservation of Collections

Who?

Conservation of the collections, including the proper care, preventive conservation, and the scientific treatment of objects and works of art is now recognised as a special profession in its own right, which requires specialised advanced education and training. Most if not all such advanced training is outside the scope of *Running a Museum*, and specialist advice on the education and training of specialist staff working in or being trained for this field should be sought, for example from International Centre for the Study of the Preservation and Restoration of Cultural Heritage (ICCROM: http://www.iccrom.org/) or the ICOM International Committee for Conservation (ICOM-CC: http://icom-cc.icom.museum/).

However, the Care and Preservation of Collections chapter of *Running a Museum* provides a lot of information on the latest research which will be of value and interest to the most highly trained specialist conservator-restorers. This chapter could therefore be used as a basis for organising and running specialist updating and practical workshops in all of these areas for established conservation. In addition, all staff should have at least a basic introduction to the principles of care and preservation of collections, and particularly preventive conservation.

What?

This chapter of *Running a Museum: a Practical Handbook* covers: deciding priorities and assessing risks; reducing future loss and damage in 100 years or more; classifying risks to collections; the nine agents of deterioration; the collection preservation cycle: step 1: check the basics - step 2: survey the risks - step 3: plan improvements to collection risk management; examples of specific risk assessments and individual solutions; integrated risk management of pests (IMP); integrated, sustainable risk management of lighting, pollutants, temperature, and humidity; museum lighting guidelines; museum temperature and humidity guidelines; museum pollutant guidelines; integrating management of all four agents. The relevant section of this chapter of the book could be used as the basis of either a single workshop or seminar or as part of an extended course covering many or all of these topics.

An introduction to the Care and Preservation of Collections should form part of every training programme, preferably also covering broader aspects of collections management and care, including relevant aspects of museum security. As in all other areas, directors and other senior management staff need to be kept up to date with current developments in relation to this vitally important aspect of the museum's responsibilities, whether through regular briefings from their own senior conservation staff or in special briefings or short workshops. The staffing and financial resource implications of conservation policy and techniques, particularly recent advances which may require additional resources or change priorities, will have wider policy implications for the museum, and hence need the active understanding and support of top management (and indeed of the museum's governing authority).

While very specialised and advanced training in conservation is outside the scope of *Running a Museum*, the summaries of the latest knowledge regarding, for example, risks to collections, including the potential causes of deterioration, risk management in relation to the care of collections, environmental standards such as temperature, humidity and pollution, and lighting standards, could all be of value in terms of updating the knowledge of existing specialist conservation and restoration staff through either formal workshop and discussion sessions or more informally.

It is also clearly important that specialist curators are also fully aware of important conservation developments in relation to their own types of collection, while other specialists such as display and exhibition staff or security and safety managers will also need training or briefings relating to the conservation implications of their own work within the museum.

Also, as some of the issues discussed in the Care and Preservation of Collections chapter of *Running a Museum* are also closely related to some aspects of other chapters, particularly those on Collections Management and Museum Security including Disaster Preparedness, those planning and delivering training and staff development should aim to stress these links, and integrate these issues within courses and other training.

How?

As in other areas, there is no substitute to action-based learning involving practical experience of the issues in relation to real problems and concerns within the particular museum, or through practical exercises based on role-play in simulated situations. For example, every staff member or participant in a course or workshop could take part in an exercise to review the risks to collections against the Nine Agents of Deterioration explained in the Care and Preservation of Collections chapter.

In the case of a relatively small museum, a course or study group consisting of perhaps five or six staff members or students could examine and report on these risks across the whole of the museum. In the case of larger buildings, or when there are a larger number of course participants, the museum could be split into several different areas, perhaps by type of exhibition gallery, study collections storage area, or type of collection, with a small group from the course or workshop reviewing just that one part of the museum. Similar exercises could be carried out in relation to other aspects of care and preservation, for example by carrying out detailed surveys of the museum environment (temperature, humidity and pollution) or lighting.

However, while such surveys or similar training programme studies can be of value in themselves, not just as training, it is very important to build on these by using the experience and the results to stimulate very open discussions about both the problems identified and possible future solutions. Again, these follow-ups do not need to be restricted to consideration of the conservation aspects. If, for example, a significant conservation problem is identified which is going to be expensive to solve, there may well be obvious ethical issues, as well as important implications for some issues considered in the Management chapter, and perhaps the Marketing chapter also, of Running a Museum.

This is another field in which standards and techniques are developing rapidly, so it is important that the museum establishes and maintains good links with other institutions, both at home at internationally. Visiting experts may well be able to lead short practical workshops with the museum's staff as part of the training programme. Similarly the museum's own specialist staff should be encouraged to communicate their knowledge and practice to other members of staff, for example in providing training in the handling of specimens and works of art for the museum's security, display and technical staff.

Sample Worksheets for photocopying relating particularly to this chapter:

8. Nine Agents of Deterioration

9. Case history of museum teamwork: sunlight and guards (security attendants)

Worksheets designed primarily to support some other chapters of *Running a Museum* may also be of value in training programmes based on this chapter.

2.5. Training in Display, Exhibits and Exhibitions

Who?

Training in exhibit and temporary exhibition planning, design and implementation is a specialised area, and it is likely that staff with special responsibilities in this area will have had, or will need, specialised education and training, probably including several years of design and communication studies in the school of design or perhaps architecture of a university, art school or other high education establishment. The chapter on Display, Exhibits and Exhibitions in *Running a Museum* is therefore not intended to replace such specialised training, though its presentation of current views and information on best practice should be of interest and value to even very experienced professionals working in the field.

However, as has already been made clear in the Introduction to this *Trainer's Manual*, it is important that all the staff of the museum have an understanding of the work and responsibilities of all of their colleagues, not least so that there is good communication and cooperation among the staff. Therefore it is desirable that all staff, including the security and visitor services personnel, have at least some outline briefings on this most important part of the museum's activities, and its main interface with the museum visitor. More substantial training and discussion between design and exhibition specialists and other professional groups within the museum will be needed, particularly curators, conservator-restorers, education personnel and visitor services staff.

This is also an area in which outside consultants, contractors or temporary staff may well be brought into the museum over and above the regular personnel, so it is important to ensure that all of these have at least a basic training in the work and operation of the museum, not least the security and safety arrangements. (See "Museum Security and Disaster Preparedness").

What?

This chapter of *Running a Museum: a Practical Handbook* covers types of displays; the object: interpretation within the exhibition context; exhibition management in relation to other museum activities; design: the basic planning and designing process; creating the planning brief; developing the exhibition; production and materials; completing the exhibition; evaluating the finished exhibition. The relevant section of this chapter of the book could be used as the basis of either a single workshop or seminar or as part of an extended course covering many or all of these topics.

The "Display, Exhibits and Exhibitions" chapter in *Running a Museum* covers a wide range of important principles and practice, particularly in relation to the design process and the different responsibilities of the various specialists who should contribute to the development of successful exhibits and exhibitions. Understanding the requirements of visitors with special needs, such as people with disabilities, is also of considerable importance. As explained in the Introduction, in a modern museum it is very desirable to promote good communication, understanding and cooperation between the different specialists on the staff.

How?

Where the museum or organisation has trained and experienced design staff these can be an important resource in developing practical training for non-specialist staff, and as important contributors to training and staff development discussion before, during and on completion of a new project. There may also be outside specialists in industry and commerce, or other parts of the public service, who will be willing to help the museum by taking part in staff training discussions and practical workshops, for example professional interior and exhibition designers, architects, graphic designers, audiovisual and multimedia specialists.

There is no substitute for seeing, discussing and evaluating real displays and exhibitions, probably

starting with those of the trainee's own museum or of the host institution or city where a training programme is not based in the trainee's own workplace. There should therefore be opportunities for viewing and discussing both old and new displays and exhibitions. In addition, participants should have access to both publications describing, illustrating and evaluating new exhibitions elsewhere around the world, as well as the growing number of on-line presentations of both "physical" and "virtual" new exhibitions on the websites of so many different museums around the world.

Display and exhibition is a field in which practical exercises are both valuable and popular with participants. For example a mixed group of trainees drawn from several different departments of the museum could be given a mixed group of perhaps ten specimens and asked to plan within a limited period (say two hours) a simple exhibit using all of these.

A more substantial team exercise would be to carry out an exhibition feasibility study, using the analysis recommended in the "Factors to be assessed and taken into account in an exhibition feasibility study" in the Display chapter of Running a Museum (page 95 in the English edition) - now available for photocopying as Worksheet D.1. of this Trainer's Manual.

Such an exercise could be followed by a further exercise to explore what staff involvement would be needed to carry this (or another) exhibition project through to completion, and to identify the roles and contributions of different specialists. Worksheet D.2 "Make-up of the exhibition project team" can be photocopied and distributed to all taking part in the training programme as a guide during this exercise.

Worksheets for photocopying

10. Exhibition Feasibility Study
11. The Exhibition Team

Worksheets designed primarily to support some other chapters of Running a Museum may also be of value in training programmes based on this chapter.

2.6. Training in Caring for the Visitor

Who?

Everyone, from national policy makers to the individual staff members throughout the museum, need to place the visitor at the centre of the museum, its services and resources. As in all other areas of the museum's activities, the director and senior management staff need to understand the principles and practice of providing good and effective visitor care and services as part of their work to help them in setting policy and the strategic planning. The relevant section of this chapter of the book could be used as the basis of either a single workshop or seminar or as part of an extended course covering many or all of these topics.

All aspects of the museum will have some impact on the visitor, and at the most basic level most staff will at some point be in contact with the public face to face, on the telephone, by letter, or increasingly through the Internet. All interaction with the visitor has to be professional so it is expected that all staff will be involved in one or more training workshops or programmes about visitors services and care. Increasingly museums are employing special visitor services staff to assist with the services to the ordinary or specialist museum visitor. These may be drawn from a wide range of specialisms and backgrounds, including for example education, curatorship, display, public relations, or cultural and other special events management. As this is a relatively new branch of the museum profession, it is likely that such specialists will probably have had little or no specialist education and training, so the museum ought to arrange practical training to guide them through the fundamentals of setting up and running quality visitor services for both large or small museums.

What?

The Caring for the Visitor chapter in *Running a Museum* covers a wide range of important topics which can (and should) be incorporated into training programmes including: an understanding of the benefits of good visitor services for museums; the underpinning principles for providing quality visitor services; some key issues to consider in developing a visitor services policy statement; defining and understanding the visitor; types of visitors and their needs; planning and managing visitor services; some specific areas for attention; and a checklist for evaluating visitor services provision and standards from the visitors' point of view. The relevant section of this chapter of the book could be used as the basis of either a single workshop or seminar or as part of an extended course covering many or all of these topics.

It is important to develop an understanding of what is meant by visitor services. These are provisions that the museum makes in the physical, intellectual and social sense to enable the visitor to have an informative, pleasant and comfortable visit, reduce levels of frustration, discomfort and fatigue, and help the visitor to enjoy the exhibitions and events. Visitor services are therefore central to the coordination of public access to the museum. Access is giving the visitor the opportunity to use facilities and services, view displays, attend lectures, research and study the collections, and to meet staff. This does not only mean physical access, but also includes access at the appropriate intellectual level that is free from social and cultural prejudice.

How?

This is a very practical area of museum work, (though there are of course underlying principles which need to be communicated), so training should aim to guide the trainee through the fundamentals of setting up and running quality visitor services whatever the type and size of museum, large or small. This is probably best achieved by a series of workshops and sessions which help participants to create a visitor services policy, to consider the roles and responsibilities of the visitor services team; to plan what services and facilities should be provided for a range of visitor groups; to look at how one collects information

about visitors, their views and experiences; to discuss the needs of different visitor groups, actual and potential. It is also desirable that those on the training programme should create for themselves a practical checklist which the staff can use to monitor and evaluate the provision to help refine and improve standards.

An outline for organising and running a training course is attached as Appendix I of this *Trainer's Manual*. This envisages the setting up and training of a Visitor Services team within the museum, and a training programme for the new team spread over a period of up to a year of sessions of half a day or less, though achieving this would depend on the resources, staff and time the museum can make available. The programme envisages that the sessions, typically no more than three hours long, will be run as a structured series so as to both build up expertise in the participants, and to feed back information that can be used to create and develop the museum's policy and strategy, particularly on visitors services, but also more generally.

Worksheets for photocopying relating particularly to this chapter:

      12. Recognising good service

      13. Knowing your actual visitors

      14. Getting to know your potential and virtual visitors

      15. Visitor services and facilities

Worksheets designed primarily to support some other chapters of Running a Museum may also be of value in training programmes based on this chapter.

See also Appendix 1: Example of a programme and trainer's notes for a Course on developing an effective Visitor Services Team

2.7. Training in Museum Education in the Context of Museum Functions

Who?

Every aspect of the museum and its various activities could be considered to be an educational opportunity and so to some degree all museum staff will be involved in creating opportunities for the visitor to learn about and enjoy the collections. It is therefore desirable that all staff have the opportunity to learn about at least the basics of learning through museums and their collections, and the work of their own museum's education programmes. The relevant section of this chapter of the book could be used as the basis of either a single workshop or seminar or as part of an extended course covering many or all of these topics.

The best examples of visitor-oriented museums have had museum educators appointed and already working in the museum's development team long before the official opening. However, there are still many museums that survive without any education department. Even if they become conscious about their obligations towards the public and decide to create an education department, very often these start off with just one person. Where the museum is fortunate enough to have specialist educational staff there should be training opportunities to enable them to keep up to date with new developments both in museum education specifically, and in general education at school and college levels.

The museum's senior management level has very important responsibilities in making policy decisions affect museum education, such as allocating resources and programmes to education within the museum's overall current finances and staffing, as well as in planning for the future, including decisions on how to expand the educational provision. Curatorial staff also need a good understanding of educational work and possibilities because curators and education staff need to collaborate in many ways, for example in planning the interpretation in the galleries for the different audience groups, or in assessing the reserve collections and identifying if there any items such as duplicates, or robust items that are not financially valuable, that could be used as teaching material. Education teams will also need to work very closely with the visitor services team, who will need to help large groups and to organise and support families, individuals with special needs as well as the individual.

What?

The Museum Education in the Context of Museum Functions chapter in *Running a Museum* covers a wide range of topics and information that can be incorporated into training and staff development programmes, including teaching and learning materials on: the relationship between collections and education, developing and managing museum education, museum education and the community, designing educational programs including the basic principles, choice of teaching and learning methods in museum education, museum publications and types of didactic material commonly used in museums, as well as extra-mural educational activities and the involvement of museums in informal education. The information and guidance in the chapter can also be used to guide a museum wishing to set up an education department, to run education programmes and to deliver outreach services.

More widely, the chapter looks at the role of education within the museum and what sort of education provision can be provided to the public, and also considers how can the museum create a positive learning environment for the visitor. It is important that all relevant staff of the museum, including the director, senior management, curators and display staff are familiar with these principles and values: museums are for much more than collecting, restoring and researching objects, and placing these on public view. The aim must be to make the museum's knowledge and collections known to the public, to people of all ages and backgrounds, and to let them participate in knowledge and culture. Consequently it is important that all staff should understand the museum's public service and educational responsibilities.

How?

The most effective approach is probably to use practical training and staff development sessions such as workshops and extended courses with practical sessions. Some of these will need to be specialist ones for those working in museum education, offering guidance on, for example, how to develop and present museum education programmes. The educational input into the museums display, exhibition and wider interpretation programmes will also need to be considered as part of the training and staff development programme. In this case the programme should involve specialists from other parts of the museum, such as designers, where groups devise interpretative material for the gallery spaces.

There should also be talks for education and interpretation staff by specialist curators and researchers on the scientific and cultural value of the collections, and on recent research and other advances in knowledge. This will be of great value in ensuring that the museum education staff, and through them the educational programmes, remain not only up-to-date, but also actively bring such advances in knowledge before teachers as well as the wider public.

However, it is also important that there are also training sessions and programmes about the educational role of the museum for mixed groups of staff drawn from different specialisations and different departments across the museum, including opportunities for the groups to discuss and come to conclusions about the planning and priorities of the education team and programmes.

In addition, it is important to provide opportunities for education and related staff to keep in touch with current ideas and trends in education, teaching and learning through contact with leading specialists in this field, and by making regular study visits to schools and colleges to observe classes and to study current teaching and learning practice more widely.

Worksheets for photocopying relating particularly to this chapter:

    16. Principles and priorities for a museum education policy and programme

    17. Writing labels and panels

Worksheets designed primarily to support some other chapters of *Running a Museum* may also be of value in training programmes based on this chapter.

2.8. Training in Management

Who?

All staff of the museum will have some relationship with the institution's management policies and systems, and many will themselves have significant management responsibilities. A British Government analysis found that around 24% of all employees have a management or supervisory role as at least part of their work, and the percentage is very much higher for those in professional positions, even though they will probably not have the word "management" in their job titles. Looking at the British figures again, the national professional body for senior management, the Chartered Management Institute, found that more than two-thirds of their chartered manager members were non full-time managers, but were primarily employed for their professional or technical role within the organisation that employs them.

Within the museum context a qualified curator or conservator-restorer, for example, is very likely to have responsibility for managing valuable technical resources, including collections and equipment, projects and their budgets, more junior staff allocated permanently or temporarily to their section, for managing the increasingly complex information relating to their collection or other duties, and - not least - to managing their own time effectively.

Museum training and staff development programmes therefore need to include at least a basic introduction to management for all levels of personnel. More detailed management education and training will be needed for the director and other senior staff, for administrative and finance personnel, and for both current and future heads of department or section in every area of the museum.

What?

This chapter of *Running a Museum: a Practical Handbook* covers management structure; teamwork; leadership styles of directors and other senior staff; building a mission statement; financial management; six rules for planning a budget; museum ethics and management; the planning process; issues to be considered; evaluation; SWOT analysis. The relevant section of this chapter of the book could be used as the basis of either a single workshop or seminar or as part of an extended course covering many or all of these topics.

The "Management" chapter in *Running a Museum* introduces a wide range of important themes which could easily form the basis of an extended formal museum management education or training programme of up to a year or so on the basis of one or two days a week, particularly if combined with closely related chapters, particularly "The Role of Museums", "Managing People" and "Marketing".

At the other end of the scale, with very limited time available each of the individual sub-topics of the "Management" chapter - listed above - could form the basis of short courses or practical workshops of perhaps half a day to three days each.

A particularly important theme that might be given priority in this are understanding the national and local laws and regulations affecting both museum operations and museum management (page 139 in the English edition of *Running a Museum*), while an understanding of the different national structures and models of museum organisation applying in the particular country or region is also very relevant. Issues relating to the internal organisation and staff structure of the museum, and of management "culture" (particularly the need to move towards an inclusive management and leadership style based on cooperation and teamwork) are other priorities.

While most museums now understand the need for full documentation of their collections, far fewer document adequately their own policies and operational procedures, starting with a Mission Statement, operational manual, planning procedures and policies, and not least self-evaluation, for example through a "SWOT" (Strengths, Weaknesses, Opportunities and Threats) Analysis.

How?

As in most other areas, there will probably be quite a lot of knowledge and expertise within the museums themselves, but this is a field in which there will also be many specialists working in business, industry and other public services who will have experience and case studies that could be of interest and relevance to the museum sector. Experience shows that many senior managers and policy makers in very different fields are very interested in museums and their collections and services, and are therefore very willing to help with management and related training for museum and other cultural service staff.

However, much the best approach is to keep formal lectures and talks to a minimum and to try to communicate through the examination and discussion - if possible in small groups of perhaps five or six - of case studies, not least the case study of the trainee's own museum, and their experience of this. To assist with and guide such group work a number of Worksheets covering some of the major issues have been prepared (see below).

Worksheets for photocopying relating particularly to this chapter:

18. National and local laws

19. Different types of museum in the country

20. Policies checklist

Worksheets designed primarily to support some other chapters of *Running a Museum* may also be of value in training programmes based on this chapter.

2.9. Training in Managing People

Who?

All staff need to have a basic briefing when they are first appointed on the museums general personnel policies and practices and on their own working arrangements. After this it is important to have written details of policy and practice on such matters as pay review and promotion applications or negotiations, grievance and disciplinary procedures, and health and safety policies, available in every workplace - ideally as an easy to understand Staff Handbook. The senior management also needs to communicate effectively with all employees when there are any changes in these conditions and arrangements, and formal briefings and training will be needed whenever such changes occur.

However, personnel management and related training is of special importance to two groups. The first are those staff members who have specific responsibilities for human resources activities within the museum, usually within the central administration of the museum. Such staff will include everyone involved in personnel recruitment, pay and employment conditions, and other important aspects of personnel management, as well as specialists such as Training Officers and Safety Officers.

However, there will almost always be a much larger group of staff who have very important personnel management responsibilities, even though they may not recognise this as part of their job. Obviously the museum directors and other senior management personnel will recognise that they are responsible for managing staff, but those in professional positions such as the more senior curators may not realise that they are managers as well, responsible for the day-to-day supervision and guidance of more junior curators and technicians within their departments or sections, and they will also be involved in the recruitment, promotion and, where necessary, disciplining such staff.

What?

This chapter of *Running a Museum: a Practical Handbook* covers: understanding personnel management; the main categories of museum work and museum employees; personnel information, involvement and fairness; recruiting and retaining high quality staff; recruitment and promotion selection methods and approaches; minimum requirements for a statement or contract of the terms of employment; staff management, training and professional development; disciplinary and grievance procedures; health and safety at work; how to assess risks in the workplace: five steps in risk assessment. The relevant section of this chapter of the book could be used as the basis of either a single workshop or seminar or as part of an extended course covering many or all of these topics.

The personnel management training needs are likely to fall into three categories, matching the three broad categories summarised above. First, training programmes should cover the basic information and training needs of all staff, both when first recruited, and when there have been significant changes in the arrangements, for example with the adoption of new policies and procedures. Second, while some of the specialist staff working in the personnel department or related areas will probably already have specialised qualifications or experience, perhaps in more general management education and previous employment before joining the museum staff, others will not have such previous training. Therefore there may be a need to arrange suitable specialist training and updating across a wide range of human resources activities. Third, it is likely that the main training priority will need to focus on those who supervise staff, particularly the senior management staff and those middle level professionals such as senior curators particularly in relation to their staff management responsibilities.

The programme of training should aim to cover – probably over an extended period of time – all the major issues outlined in the Managing People chapter of *Running a Museum*, including personnel information, staff recruitment and promotion, terms and contracts of employment, training and staff development, disciplinary and grievance procedures, and health and safety at work.

How?

As explained above, each institution needs clear, easy to understand, documentation of staff conditions and responsibilities, preferably in the form of a clear Staff Handbook, and both formal and informal training and briefing sessions can be built around this. Building on this, more advanced and specialised course and practical workshops using case studies and role-play should be developed, particularly for the more senior staff with personnel management and supervision responsibilities. It would also be desirable to coordinate and integrate training in this field with the issues covered in the Management and Museum Security chapters of *Running a Museum*.

The proper management of the human resources of an organisation including related issues such as health and safety at work is relevant to every area of work, public or private. While most aspects of museum work, and therefore museum training, are specialised, perhaps unique, to the museum sector, expertise in personnel management policy and techniques is just about universal. Therefore it is almost certain that those planning and undertaking training for museum staff in this field will find in their own city or region a large number of experienced senior personnel staff and human resources education and training experts. Many successful museum training programmes covering the personnel and more general management fields have been able to bring in the wider perspective and "outside" expertise.

Worksheets for photocopying relating particularly to this chapter:

 21. Key factors in relation to employment terms and conditions

 22. Corporate health and effectiveness

 23. Writing a job description and personnel specification

 24. Writing a statement of terms of employment

 25. Five steps in Risk Assessment

Worksheets designed primarily to support some other chapters of *Running a Museum* may also be of value in training programmes based on this chapter.

2.10. Training in Marketing

Who?

In most countries marketing is still a relatively new area of museum activity. Consequently, across the world relatively few museums or related institutions and organisations have so far appointed specialist staff in this field or related areas of museum management (such as public and press relations, membership development or fundraising).

Under most traditional museum governance and funding systems, most if not all of the activities of the museum were financed by national or local government out of taxation, with little or no requirement that they engage with its actual or potential audience or seek wider financial and other support, such as external grants, sponsorship and partnerships with other organisations, whether commercial, not-for-profit foundations or international aid and development grants and loans, as well as practical support by volunteer staff. With such changes becoming widespread in many countries and museum systems, it is important that all managerial and administrative staff with policy and financial responsibilities should be aware of recent developments and current trends in relation to the marketing of museums.

However, some museums and related bodies using *Running a Museum* in training and staff development may already have specialist marketing staff. If so, their professional training and experience will almost certainly have been in general marketing, most probably orientated towards the business sector, since there are only a tiny handful of specialist programmes in e.g. museum or wider cultural management who offer specialist education in museum marketing.

More usually, whatever marketing activities are undertaken by the museum will be the responsibility of non-specialist staff whose own training, and probably their main day to day duties will be in other areas, such as general management and administration or perhaps visitor and educational services. The chapter should be of special relevance to those taking on a marketing role within the museum without formal qualifications, or perhaps even experience, in the subject.

What?

The Marketing chapter of *Running a Museum: a Practical Handbook* provides information and guidance on a wide range of themes, which can be used for both individual study, and as the basis of more formal courses and practical training exercises. These include: introduction to marketing; the current orientation of museums in relation to marketing theory and practice; product, price, promotion, place; strategic market planning; mission and vision; internal and external factors; target groups; promotion; advertising; public relations; building a museum "brand". The relevant section of this chapter of the book could be used as the basis of either a single workshop or seminar or as part of an extended course covering many or all of these topics.

With moves towards a more market-orientated approach to museums and related institutions and services becoming widespread in many countries and museum systems, it is important that all training and staff development programmes should aim to familiarise staff in all departments and of all levels with these governance and management trends and with the principles and practice of marketing, as well as providing a basis for more advanced training, policy discussions and forward planning by more senior staff. The Marketing chapter will also be of special value to such experienced marketing specialists who have moved into the museum from a perhaps very different area of work or type of organisation area, since it specifically examines current views and experience in the marketing of museums and related facilities and services.

How?

While it is important to have information and staff discussion sessions in any training programme about the nature of marketing and related fields and their impact on the museum sector, this is a field in which there is almost unlimited scope for practicing a wide range of marketing and related techniques, many of which could serve not just as a training exercise but would be of lasting benefit to the museum and its future development.

For example, in even a very short workshop of perhaps just one day, time could be found for the participants to spend some time on a small market research study, for example interviewing museum visitors, preparing an evaluation of an exhibit, or writing publicity material about the museum or a future special exhibition or event for an advertisement or press release. Those taking part in a longer training programme, perhaps one or two days a month over a period of several months, could make a real contribution towards the development of long-term strategies, such as developing the museum "brand" or a longer-term public relations and membership or "Friends of the Museum" campaign.

Marketing is also one of the fields in which the museum will find a lot of expertise in the local business community, in university and other management schools, and perhaps in other parts of the public or voluntary service. Experience in many parts of the world shows that many such organisations and professionals working in the field of marketing, including market research, advertising or public relations, are very interested in museums and their work, and would be happy to help by making available their expertise.

It is very desirable that both the museum's own marketing section and those responsible for its training and staff development programmes build up good relations with local specialists. They can often bring practical case studies of their own experience into more formal training sessions and workshops. Also, as museum marketing is still in an early stage of development in most parts of the world, it is very desirable that training programmes include opportunities to make study visits to look at the way in which marketing and promotion are approached in a range of other organisations seeking to relate to the general public, for example a major tourist hotel, leisure park or heritage site such as a national park, as well as in other museums in the country or region.

Worksheets for photocopying relating particularly to this chapter:

26. Strategic marketing planning analysis

Worksheets designed primarily to support some other chapters of *Running a Museum* may also be of value in training programmes based on this chapter.

2.11. Training in Museum Security and Disaster Preparedness

Who?

Security and safety, in all their aspects, must be seen as the responsibility of everyone connected with the museum or related institution. Protecting the often unique collections is a most important professional and ethical responsibility of all, while in most if not all countries all employers and owners or occupiers of buildings and land are legally obliged to ensure so far as practicable the health and safety of everyone entering the museum, whether visitor or employee. Security and safety are not just a matter for security officers or guards and their supervisors. The governing authority (e.g. Ministry, Board) also needs to understand the importance of providing a secure and safe environment, while the Director and other senior staff have a special responsibility to ensure that the management systems, including staff organisation, supervision and training, meet the necessary standards.

Therefore, training and information sessions relating to security and safety need to be provided for all connected in any direct way with the museum. Every new employee or volunteer, regardless of the level of their work or their previous experience, needs a security and safety briefing before they start work, and similar arrangements need to be made for training the employees of contractors working either regularly (e.g. services maintenance contractors) or on special projects (e.g. building alterations, installation of a new exhibition) within the museum. This initial information and training in security and safety procedures needs to be followed by longer-term and more specialised training relevant to the particular job or level within the institution.

Relevant regular training and re-training should also be arranged for all the specialist staff according to their responsibilities: curatorial, conservation, education and communication, administrative etc., while more intensive and specialised training in security and safety matters, including the proper operation and use of electronic and other security and safety systems will be needed for the security staff, including the museum security officers or guards. There can be big benefits in bringing together different types of staff into the same training course group and encouraging an open dialogue among its members. A specialist curator might then be able to discuss with e.g. a security guard or an exhibits designer the significance and importance of an object or collection, while a conservator-restorer could point out why e.g. low lighting levels or "do not touch" rules are needed for particular objects or collections.

What?

This chapter of *Running a Museum: a Practical* Handbook covers the following themes and sub-topics: implementing the strategic plan for museum protection; measures to ensure security in display and exhibition rooms; intruder detection system (IDS); access control system (ACS); closed circuit television (CCTV); automatic fire detection and alarm system (FAS); the emergency plan, and also has Appendices covering a model emergency plan, a simple risk analysis form, fire safety procedure and a model incident report form. The relevant section of this chapter of the book could be used as the basis of either a single workshop or seminar or as part of an extended course covering many or all of these topics. With supporting local information and practical work, this chapter of the book alone offers enough material for a full-time course lasting several weeks, or perhaps a programme of several months of day or perhaps half-day practical sessions for those with special responsibilities in this field.

Security must begin with an effective policy and a system for enforcing this, as is stressed in the box: "Who is responsible for security policy and its enforcement?" (page 179 - English edition). This needs to be developed into a practical policy statement applying to each institution, based on a risk analysis for each building or site. All staff need to have a reasonable understanding of all important security systems and aids that are in use in the museum. In addition, those with policy and management responsibilities need to have a wider understanding of what is currently possible in terms of physical and

electronic security systems so that they can keep under regular review the current arrangements, and consider whether these need to be upgraded.

Where emergency and security policies already exist for the museum or museums, provide photocopies of these to participants (or samples from various participating museums if the training programme members are from more than one institution). Where they exist, policies should be reviewed, perhaps using group discussion; where there are no existing policies the trainees' work could contribute towards new policy statements on emergencies and security: see Worksheet for photocopying no. 27 – Preparing an Emergency Plan.

How?

The best source of training expertise is very often within the museum or related body itself, and those organising training programmes should build up a list of local museum and other specialists who can help with the training. Also, the museum staff participating in the training will almost always have their own experiences and views, positive or negative, and they should be strongly encouraged to share and discuss these with the rest of the training group.

Many museums also have developed close links with their national or local security and safety organisations, including the police, fire, civil protection, and public safety authorities or organisations. Such bodies are usually very pleased to have the opportunity to participate in museum training programmes and training exercises, and e.g. to demonstrate the correct operation of security and safety equipment, such as fire extinguishers.

In addition, try to arrange study visits to the premises of cooperating security and safety services and organisations, e.g. fire stations, security or emergency operations control centres, as well as to museums and other cultural premises (e.g. major libraries or archives) with developed security and safety systems.

A risk analysis training could involve the training group in discussion of some possible risks and both inspection of the buildings and research into the frequency and potential force of natural hazards, e.g. flood or earthquake. A Risk Analysis form, based on Appendix 2 (page 194 - English edition) of the Museum Security and Disaster Preparedness chapter of *Running a Museum* is included in this *Trainer's Manual* for photocopying and distribution to the course.

In relation to physical and electronic security aids, the technology is constantly being improved: this is especially important in relation to crime prevention, since criminals are constantly seeking to develop methods for overcoming each new security system that is developed. Also, new approaches to fire and safety issues are always being developed. It is therefore very important that those concerned with both security management and with training keep in close touch with sources of specialised information and advice on advances in technology, such as international colleagues, e.g. through the ICOM International Committee for Museum Security (ICMS) http://icms.icom.museum/ In many countries there will also be national and local security and safety sources, such as a crime prevention service of the national or local police or a fire prevention and safety department of the local fire service, while the manufacturers and suppliers of specialist security equipment can also be valuable partners in training.

Worksheets for photocopying relating particularly to this chapter:

> *27. Preparing an Emergency Plan*
> *28. Risk Analysis*

Worksheets designed primarily to support some other chapters of *Running a Museum* may also be of value in training programmes based on this chapter.

2.12. Training in Illicit Traffic issues

Who?

Everyone concerned in any way with acquisitions and museum fieldwork and collecting, including curators, documentation or registration specialists and field research staff, need to have a sound knowledge of both the national and international legal and ethical obligations in relation to additions to the museum's collections. In addition, full compliance with both the details and the spirit of such legal obligations and the museum's published policies and ethical standards, is a most important obligation of the director, other senior staff, and indeed of the museum's governing body or authority. The rest of the staff at all levels should also be made well aware in general terms of the legal and ethical obligations of the museum as part of their general training and staff information and updating.

What?

The themes covered by the "Illicit Traffic" chapter of *Running a Museum*, include: prevention of looting and illicit trafficking; the importance of good inventories, including an introduction to the Object ID checklist developed in cooperation with police and customs authorities; national legislation; the risks posed by tourists and visitors; training; detection of illicit trafficking; recovery, including the value of international co-operation; an introduction to the key International Conventions; recovery where the Conventions do not apply; and the possible need to litigation. All or part of each of these themes can be used in training and staff development programmes based on the book.

This chapter relates closely to those on Museum Security and Inventories and Documentation, as well as Collections Management, and training in relation to the risks to the national and international heritage of theft, illegal excavations, looting and international trafficking can be integrated into training for those fields as well. However, some specialised training of those members of staff most likely to be concerned with illicit trafficking will be desirable, particularly in relation to the national and international law that applies in the country concerned.

How?

Those participating in a training programme in this field can undertake practical exercises which will be of lasting value to the museum, for example in helping to develop a risk assessment and disaster preparedness study in relation to risks to the collections. They could also research national ands international provisions applying in the country. Where, as is frequently the case, a major national or regional museum also has responsibility for a national antiquities service and the protection of archaeological sites and ancient monuments, student projects and study visits should also cover these. Two other public agencies: the police and the customs service, also have important roles in relation to the detecting of cultural property crime and the enforcement of measures against illicit trafficking. It is therefore very desirable to develop close links with both, and to involve representatives of each in museum training programmes.

Worksheets for photocopying relating particularly to this chapter:

29. International Conventions and Cooperation

Worksheets designed primarily to support some other chapters of *Running a Museum* may also be of value in training programmes based on this chapter.

Example of a course programme and trainer's notes

3.1. Summary Programme for a Course: Developing an Effective Visitor Services Team

Introductory notes for the Trainer

Both national policy makers and individual staff throughout the museum need to place the visitor at the centre of the museum, its services and resources. Therefore developing an understanding of good services to the visitor needs to be included in training programmes for all levels of staff and all specialisations. All aspects of the museum will have some impact on the visitor and for most staff they will at some point be in contact with the public either by phone, on the web or by latter, or face to face. For example, senior management staff who to help set policy and strategic planning need to understand this, while specialist staff in other areas, including curators, conservator-restorers, other specialists, and the administrative, maintenance and security staff, all need to understand what is happening in relation to developing and improving services to the visitor.

The Caring for the Visitor chapter of *Running a Museum: A Practical Handbook* includes a lot of information on the subject which can be built into both general museum studies and similar training programmes, as well as in short training workshops and programmes for those with special responsibilities in relation to receiving and helping the museum visitors. However, those members of staff working specifically within the Visitor Services sector will need more training (and regular re-training and updating) in relation to both their current duties and to their chosen future career within the museum and related sector.

The Developing an Effective Visitor Services Team training programme summarised in this Appendix uses an action-centred approach to training and staff development through discussion, planning and training in Caring for the Visitor. It aims to help the museum and its staff to develop and run a high quality visitor services operation within any museum, large or small. Ideally, this programme would be implemented over an extended period of several months, perhaps up to a year, with the visitor service staff attending from time to time a series of short training sessions and practical workshops, in most cases of no more than a half-day at a time.

In between the scheduled sessions of the course, the specialist staff will continue with their regular work and aim to apply what they are learning in their own work. Those organising the training should also try to involve staff from different areas of museum and related work in at least some of the specialist visitor services training sessions in order to promote the very necessary understanding and co-operation between those with special responsibility for the various service for the visitor and the rest of the museum's staff and work.

However, where this is not possible, for example where the trainees are in several different institutions in different towns (or even countries) some or all of the programme can be adapted for use in short full-time courses of perhaps one or two weeks, while individual elements in the programme and the related topic within *Running a Museum* could be used as stand-alone practical workshops for both visitors services specialists and the museum staff as a whole.

Organisation of the course

What are visitor services?: These are provisions that the museum makes in the physical, intellectual and social sense to enable the visitor to have an informative, pleasant and comfortable visit. Good visitor services reduce levels of frustration, discomfort and fatigue, and help the visitor to enjoy the exhibitions and events. Without good visitors services the opportunities for enjoyment and learning are radically reduced, and the number of return visits will fall. Visitor services are central to the coordination of public access to the museum. Access is giving the visitor the opportunity to use facilities and services, view displays, attend lectures, research and study the collections, and to meet staff. This does not only mean

physical access, but also includes access at the appropriate intellectual level that is free from social and cultural prejudice.

The aim is to guide the reader through the fundamentals for setting up and running a quality visitor services for a large or small museum. This is achieved by a series of workshops and sessions which are to help participants to create a visitor services policy, to consider the roles and responsibilities of the visitor services team; to plan what services and facilities should be provided for a range of visitor groups; to look at how one collects information about visitors, their views and experiences; to discuss the needs of different visitor groups, actual and potential. Finally there is a mini series of workshops on creating a checklist for staff to use to monitor and evaluate the provision to help refine and improve standards.

To set up such a provision as a visitor services team could take up to a year to achieve depending on what resources, staff and time the museum has available. The sessions should be run as a series so as to build up expertise and have information that can help create the policy and strategy. Some sessions can be three hours long others may be completed in less time.

Training Programme Theme 1 - Introductory Session - Experiences of Good and Bad Service: Trainer's Notes:

Begin with a warm-up session to get the people on the course talking and working together straight away, rather than just listening to lectures. Start by going round the room asking each participant (including the tutors) to introduce themselves with their name and a few words about themselves. The trainer should give a suitable short introduction to the exercise, such as:

> "Just sit and think for a moment or two. Where have you recently received good or bad service: in a restaurant or cafe, a shop, on board a train or aircraft, at a bank or perhaps a government office? What did the service consist of? How did you assess whether the service was good or not? Did you receive a welcoming smile, clear and accurate information, clean and working facilities, or was someone rude, there were no instructions, the place was untidy, you were asked to wait a long time without explanation? Were your expectations exceeded or diminished?"

After this distribute to each member of the course a copy of Worksheet 12: *Recognising Good Service*, **which calls for everyone to discuss the questions in the Worksheet in groups of two (or three), and to note down what each felt made experiences both positive and negative. First, ask each small group to use Worksheet 12 to jot down key words or phrases such as 'welcoming smile', 'offhand'.**

After 10-15 minutes ask each pair to report back to the whole group with one positive and one negative comment: these are written on a flip chart, blackboard or overhead projector.

Through discussion try to get agreement on the top 10 positive characteristics of a quality visitor service and then to say how does their museum match these. How do they know ?

The group then goes on to discuss ways of establishing a good standard of visitor service and what has to be put in place to ensure these standards are met and maintained.

By this time it will probably be time for a short break of perhaps 10 minutes.

The trainer or trainers, perhaps with the help of specialist members of staff or an "outside" expert, can then talk about the nature of good visitor services and give an introduction to this Visitor Services training programme, and to the main themes of the Caring for the Visitor chapter in *Running a Museum* etc.

Finally, each participant should consider what they can do in their day to day tasks to contribute to the quality and enjoyment of the overall visitor experience, and agree to try these ideas out in their own work.

Training Programme Theme 2. Developing a Visitor Services Policy and Strategy

After a short introduction to the aims of this training session, distribute Worksheet 30: *Rationale for a Visitor Services Policy and Strategy*, **and in groups of three discuss the four key questions in the Worksheet, making notes on key points raised:**

Why should one provide a good service to visitors?

What are the benefits for the museum?

What are the underpinning principles for providing a quality visitor service?

Are there any topics that members of the group disagree about and why?

After a suitable period of time working on the exercise, each group should report back their responses, and these should be summarised under each question on a flip chart or blackboard etc.

Trainer's notes:

Through discussion, identify the key issues that the group as a whole have raised. How can these be used in developing a visitor services policy and strategy document? Hopefully participants will include the following main topics discussed in the Caring for the Visitor chapter of *Running a Museum*.

Raising staff morale

Marketing potential

Forming support (or "Friends") groups

Advocacy

Professionalism

What do you think are the underpinning principles for providing a quality visitor service?

Human Rights, particularly Article 37 of the Universal Declaration of Human Rights

Open consultation with all its stakeholders

Providing an integrated policy and strategy for visitors' services.

The care of the visitor (actual or virtual) is the responsibility of every member of staff

The relevant part of the Caring for the Visitor chapter has detailed notes under each of these headings which can be used by the Trainer. If any key issues seem to have been missed, the trainer could then mention the phrase in turn and ask the group to explore further the ideas behind each.

Aim to finalise the list on a flip chart and prioritise them by the end of the session. Afterwards have the list typed up and copied for distribution to the group for future reference and discussions.

Theme 3: Understanding the present visitor services and facilities

Distribute to each course member a copy of Worksheet 15: Visitor services and facilities. Working individually, ask each to make notes in response to the questions on the Worksheet.

Then the Trainer should ask each participant in turn to report back on one or two of their responses. After this the Trainer should lead the whole group in discussing the four questions:

What facilities does the museum offer currently?

Which type of visitor is most likely to benefit from these and which type of visitor is less likely to benefit from these?

What facilities would the museum like to offer in the future?

What services does the museum offer currently?

Trainers Notes on the four questions:

The present facilities and services might include:

Physical facilities: e.g. toilets, hand basins and water fountains, seating, disabled access and other services for those with disabilities, garden area, parking, café, lunchroom for school groups bringing their own packed meals, cloakroom, research room

Services: These might include: bookshop, library with public access, services to schools, a visitor information point, and inquiry service about the collections, identification service on objects brought to the museum, loan services photography, access to collections through the web.

(By this time it will probably be time to have a short break)

Continue:

1. *Which type of visitor is most likely to benefit from these and which type of visitor is less likely to benefit from these?*
2. *What additional services should the museum aim to offer in the future?*

Bring together the various views and use them to prepare a summary of both present visitor service facilities and services and possible future improvements for use in future planning and training.

Theme 4: Knowing and Understanding the Visitors

Trainer's Note:

It is worth considering working in partnership with a specialist department of a university or market research company. This could help in developing some basic skills and knowledge on how to set up surveys that will produce quality information. This theme could easily be extended into two, three or even more half-day sessions if experienced visitor or market researchers (or other experts, such as consumer or leisure psychologists) are able to assist, perhaps with case studies and advice form their own experience elsewhere.

1. Introduce the theme by outlining the need to understand and research the museum's visitors, (Running a Museum pages 108 - 109, including Box 3)

2. Explain some of the different visitor research techniques used by museums, including qualitative and quantitative methods. (If possible try to involve either an experienced museum visitor researcher or someone with more general market research experience in this session.)

1. Visitor Questionnaires
2. Focus Groups
3. Postal and Internet Surveys
4. Visitor Book Comments and Comment Walls

(Running a Museum pages 109 - 110, particularly Box 5)

(You will probably need to have a short break at this point)

3. Lead a discussion with the whole group to identify the different types or categories of visitor (Running a Museum pages 111 - 113), noting on a flip chart or blackboard the categories that are especially relevant in the case of the museum.

1. Individuals
2. Independent adult groups
3. Family groups
4. Educational groups
5. Visitors with additional needs (physical and mental disabilities

Theme 5: Knowing your actual visitors

(This is another substantial and important topic which may well be worth two or three workshop sessions rather than the normal one session.)

Distribute to each course member a copy of Worksheet 13: *Knowing your actual visitors*, and arrange participants in small groups of perhaps three or four.

Trainer's note:

Remind the course that actual visitors are those visiting the museum, whether regularly or only occasionally, at the present time, and that in developing and improving the museum's visitor services it is important to understand who the current visitors are, (see *Running a Museum*, pages 109 - 113). (If there has been some recent visitor research at the museum, or if the Trainer has a copy of a case study from elsewhere this could be distributed and incorporated into the exercise, in which case more time will be needed for the Theme - perhaps a double session.) Then ask each group to consider the six questions in the Worksheet, note their answers to these in the boxes provided on the Worksheet.

After a suitable time working on the Worksheet (perhaps half an hour) each group should report back to the whole course, and key responses are noted on a flip chart or blackboard.

(You will probably need to have a short break at this point)

The Trainer (and any visiting experts if present) should then lead a discussion with the whole course on ways to improve the museum's knowledge of their current visitors. Themes for discussion may include:

1. What information does the museum have already? Is it accurate? Up to date? Accessible?
2. What further information is needed? Do different departments want different information? What type of information do they need and why? What type of information is it? Just numbers or people's attitudes and views?
3. How should we collect the information? How often should it be done?
4. How can we make sure that the information will be of use?
5. Who should be involved in collecting information?
6. What are the stages we need to go through to gather enough information to help us with improving our facilities and services?
7. What is the deadline when we want all the information collected and interpreted for different people in the museum to then use?

Trainer's note:

Statistics and other information that may already be available include overall attendance figures in different categories (e.g. adult and child ticket sales, free admissions), records of the numbers in special categories, such as school visits and number of children in each group, and the number of people on the museum's mailing list for attending exhibition previews. Again, a written summary should be typed up after the session and distributed to course members for use in the future sessions.

Finally, discuss how to improve and collate this information, making it user friendly and accessible.

In preparation for the next step, each course participant should aim to understand their own role in or contribution to collecting and or interpreting the information. A key message should be to make sure that the information collected is really wanted by someone who then knows what to do with it in order to improve facilities and services. Otherwise the often very considerable effort involved in gathering the information will be a waste of everyone's time and energy.

Therefore end by allocating responsibility for gathering, coordinating and communicating visitor statistics of this kind, and consider a strategy for collecting new data.

Theme 6: Understanding your potential and virtual visitors

Distribute to each course member a copy of Worksheet 14: *Getting to knowing your potential and virtual visitors*, **and arrange participants in small groups as above.**

Trainer's notes:

It is important to stress that even when there is a large and regular attendance, a museum's visitors are typically drawn from a perhaps limited range (e.g. geographical, social, educational standard) of the total population that could visit the museum.

Potential visitors are those people who could visit the museum and who the museum would like to attract but who don't visit regularly at the present time. Increasingly, people are using the Internet or other remote communication methods to "visit" museums far away from them – perhaps on a different continent - and at times, perhaps during the night, when the "physical" museum in its buildings is not open.

Virtual visitors is the term used for those accessing facilities such as educational programmes or access to information about the museum's collections and research, via its website or other virtual "outreach". Virtual "visiting" is expanding very rapidly and already a number of the world's largest and most popular museums now have more virtual visitors than physical visits. If a suitable Internet connection together with computer and digital projector are available, the Trainer could demonstrate what is available to the virtual visitor on the websites of several museums of different types, sizes and geographical regions. If not, the Trainer should distribute or write up on the flip chart or blackboard the web addresses of these museum sites so that course members can "visit" these themselves at some other time.

After a suitable time discussing the points on the Worksheet (perhaps half an hour) each group should report back to the whole course. Key responses should be noted on a flip chart or blackboard, and at the end of the session they are typed up as part of the research for the visitor services policy and strategy.

Theme 7: Making the Museum Family-Friendly

Distribute to each course member a copy of Worksheet 31: *Making the museum family-friendly*, **and arrange participants into small groups to review this topic and then report back to the whole course, as with previous Worksheets.**

Trainer's notes:

Children and young people are important to most museums, not least since they will be the voters, politicians, public officials and - it must be hoped - the visitors of the future. Most children and young people are first introduced to museums either through school and college visits or as members of family groups. Encouraging family visits therefore means that the museum is encouraging interest in museum visiting at an early age and hopes to creates a pattern of social behaviour for life. Family groups often extended to cousins and other relatives and can be major components of the domestic tourist sector.

After the report back, discuss with the whole course ideas for facilities that would be useful and attractive to family groups in particular, for example:

Providing facilities of all kinds that respond to the needs of a wide range of ages and interests. The need for spaces to relax and eat

A play area outside

Good and accessible facilities such as toilets , tables and seating

Creating special displays, activities or leaflets and quizzes. Family groups include adults who may well return on their own at another time. A successful museum will aim to greet family

groups rather than just tolerate them.

Activities that include all age groups not just the children or just the adults.

Small boxes for children to stand on to see in the cases

Performance spaces for groups to listen to story tellers, watch dancers,

End the session by agreeing how to proceed to improve the services for family groups within the museum - both perhaps small changes that can be implemented very soon, and proposals for more substantial long-term improvements.

Theme 8: National and International Tourists

Explore the actual and potential service of the museum to local, national and international tourists. If possible, include in the course programme talks from one or more contributions from tourism experts who can provide about the wider tourist industry of the country or region including the tourism statistics and the economic contribution of tourist of different kinds. The trainer should then lead a general discussion on the current and future potential value of the museum to local tourism, and of tourism to the museum. Course members could also be introduced to the Marketing chapter of *Running a Museum*.

Trainer's Notes:

Tourist visitors, particularly those arriving in organised groups, tend to have only limited time available, hence small guidebooks or leaflets on the "highlights" of the museum are a great help. Another priority is to offer translations of the guidebook or to provide either tour guides who can offer different languages or multi-lingual sound guides.

Other requirements, particularly for tourists arriving in organised groups, include:

1. a pre-booking system for specific times for both the museum and any museum cafe, so that tour guides and other arrangements can plan ahead
2. a quick welcome and general introduction to the museum, followed by guided tours of the highlights; visiting groups will have different lengths of time available, so tours of different lengths will need to be offered
3. spaces for coach parking
4. sufficient toilet facilities near the car park or main entrance: those arriving on bus tours may have been travelling for some time and are likely to want to visit the toilets before starting the museum visit
5. spaces for groups to gather around the highlights of the museum's collections
6. external spaces where groups can gather and relax in the open

End the session by identifying changes and additions to the museums visitor services that should be made to improve its services to, and support by, both national and international tourists.

Theme 9: Creating a visitor services policy and strategy

Trainer's note:

All participants should be briefed to bring to the session copies of previous working papers from the course, particularly the conclusions on the key underpinning Theme 2 (Developing a Visitor Services Policy and Strategy Principles and Worksheet 30 of Theme 1, and their list of characteristics that make a quality visitor experience from Theme 1 (Worksheet 12).

After a short introduction to the aims of this training session, distribute Worksheet 32: *Creating a*

Visitor Services Policy and Strategy, **and in groups of three discuss the questions in the Worksheet, making notes on key points raised in the numbered boxes provided.**

Trainer's notes:

Each small group should then report back to the whole course. After discussion, key issues should be agreed and summarised in writing. This work should be carried forward over the next few weeks, perhaps by a small working group, into draft notes on recommendations for a Visitor Services Policy and Strategy document for wider consideration throughout the museum, including consultations with the Director, senior management team, and all main departments.

Theme 10: Delivering Visitor Services

Trainer's note:

The aim of the session is to identify the key responsibilities of the Visitor services team and how these should be delivered and at what standard. In addition to all course participants, this should involve any other potential visitor services team staff, and at least one member of the senior management team, and a member of the education team should also be asked to take part. (These additional staff members should each be allocated to different working groups for the practical session.)

After a short introduction to the aims of this training session distribute Worksheet 33: *Delivering Visitor Services*, **and in groups of three discuss the questions in the Worksheet, making notes on key points raised in the numbered boxes provided.**

After a report back and discussion period, as in previous sessions, aim to decide on the next steps in relation to establishing or improving a Visitor Services Team. These should include planning and allocating responsibility for the next stages in planning a strategy generally, and with each course member looking at their own areas of their responsibilities, and setting up or improving procedures to improve the service for visitors more generally. (These are wide-ranging and very important issues, so it may well be that two or more sessions will be needed, with a period for reflection and consultation in between

Trainer's notes:

Some key questions to be considered in building a visitor services team:

The team may include receptionists (at the visitors' desk and on the telephone switchboard), gallery security staff, special events management personnel and education staff. In fact, it should include all the staff who meet the public face to face on a regular, if not daily, basis.

Decisions have to be made as to who is responsible for what duties, how should the team coordinate their activities, and what is the purpose of each activity (educational, fun, security and safety).

Should all the Visitor Service team be easily identified by uniforms, badges or some particular accessory such as a tie or scarf? Important decisions also have to be made as how to arrange a work schedule so that all public areas are staffed throughout the museum's opening hours, (which are likely to be longer than the normal working week for any individual employee).

Another important policy decision is how should complaints be dealt with? Should a senior member of staff be called down to meet the dissatisfied visitor in every instance? Is there a mechanism for the staff to apologise (if appropriate) through offering a free entry in the future or something from the shop or café? How much responsibility can be given to individual staff?

On a more informal basis most museums have a visitors' book and/or a box for people to "post" their comments, both positive and negative. Although not every comment will be

useful or realistic, often than not they can highlight things that might otherwise have been overlooked, unnoticed or ignored. There also needs to be a mechanism for complaints to be dealt with by responding promptly by post. Many public service and corporate organisations set time limits for their staff time by which queries or comments should be responded to (typically within 7 working days).

The Visitor Services team with the senior manager need to set up systems for monitoring and evaluating services offered. Having decided on the level and standard of service, staff can regularly check if everything is in place and at the standard required. What type of checks should these be and how often? Who will carry them out? Are there issues to do with attitude, timing, accuracy? How will these be resolved while maintaining morale and staff motivation?

It is also important to establish an achievable timetable of improvements which are prioritised according to need, resources and plausibility.

Theme 11: Communication and Information Group: Gathering Information

Trainer's notes:

The primary role of the Communication / Information Group is to set up mechanisms by which information is gathered, checked for accuracy and disseminated in a variety of formats to different audiences. The priority for this session will be to work with those who are likely to make up the museum's Communication and Information Group, drawn from the Visitor Services staff, together with a member of the senior management team, and the head or a representative of all departments. The aim is to agree what information is needed to help visitors make the best use of their time in the museum and accessing the website.

Distribute to each member of the course a copy of Worksheet 34: Communication and Information Group: Gathering information. Ask each group of two or three course members to answer and report back at the end of this part of the session on two of three of the questions in the Worksheet. The views expressed in the report back session should then be recorded and written up for later distribution.

(At this point it will probably be time for a short break.)

The Trainer should then lead a general discussion and seek agreement on the following:
1. What do you think the museum is already doing well?
2. In order of priority, what are the most important things to achieve in the next 3 years to improve visitor services?

Theme 12: establishing the museum's Communication and Information Group

Trainer's note:

In consultation with the Director and senior Visitor Services staff, select and establish the museum's Communication and Information Group using the questions and guidance notes below.

Working through and answering the three key questions listed below may well need several working sessions and meetings over a period of time, as well as wide consultation across the museum.

1. Who should be members of the museum's Communication and Information Group?

Trainer's note:

This group in likely to bring together representatives of a number of different aspects of the museum's work. Its primary role is to set up mechanisms by which information is gathered, checked for accuracy and disseminated in a variety of formats to different audiences. The purpose is to ensure that all

information is up to date, accurate and accessible. This is not only for the public's benefit but also for the staff. The group is likely to include a graphic designer who understands visual communication, someone with good editorial skills, an audience advocate, members of the visitor services team and the museum's Web Editor or Manager.

2. What should be its terms of reference and responsibilities?

Trainer's note:

These will need to be discussed and negotiated within the museum according to the often unique circumstances of the particular museum.

3. What should be the Group's priorities for the coming year?

Again , this will depend on the needs of the particular museum at the time, but purely as an example the Group and the museum's senior management might agree on a list of priorities such as the following:

General issues:
> Information
> Direction signs for visitors looking for the museum
> Orientation information and signs within the museum

Specific areas for attention
> The Reception/Enquiries Point at the museum's main entrance
> Improved cloakroom provision for umbrellas, coats and bags/ child buggies (strollers)
> Reviewing toilet provision
> Café or Restaurant
> The services and stock of the Museum Shop
> Outdoor area

Once the Group, its terms of reference, and its medium-term objectives and programme are agreed, regular meetings of all the Group and of project subgroups will be needed as follow through.

Theme 13: Benchmarking: Reviewing the Museum from the Visitor Point of View

Staff should be given copies of Worksheet 35: *Benchmarking,* and sent in small groups of perhaps two or three to make one or several visits to an unfamiliar museum, or to another visitor- or customer-oriented attraction of facility, public or commercial.

After the visits there should be report-back sessions at which each group can tell the whole course about their observations, outlining examples of good practice and customer care standards, adequate standards that could be improved, and seriously failing provision and standards.

Trainer's notes:

It is very important that Visitor Services staff learn to observe and analyse critically the facilities and services of the museum. However, their own establishment may be too familiar for them to notice weaknesses and problem points. Therefore all need to develop their critical skills by visiting and analysing different customer-oriented facilities with which they are not familiar (at least from this point of view). From this they will be encouraged to help establish visitor service and care standards to which the museum overall can aspire, while encouraging individual staff members to have the visitor and his/her needs at the forefront of their current activities and their plans for the future.

Theme 14: From the Visitor's Point of View

After gaining experience in judging critically the customer or visitor services facilities of other establishments, the visitor service team staff should then use this experience and the feedback discussion of their findings in reviewing their own museum. Working in twos they should use Worksheet 36: *From the Visitor's Point of View* to carry out similar observations over a period of approximately two hours during the museum's normal opening hours, and record their observations on the Worksheet.

The whole course should meet again soon afterwards to receive and discuss the findings of these surveys. Notes should be made of the various ideas as to how standards and services could be improved, and these should be typed up and distributed for future reverence and discussion.

Trainer's notes:

Involve all categories of staff, including newer members of staff (regardless of grade: it does not matter whether they are a cleaner, gallery attendant or curator). Though a checklist is suggested in Worksheet 36, it should be made clear that all are encouraged to add their own points to the checklist.

This exercise should be repeated at least annually to see if the situation has changed. Of course what determines "good" has to be discussed which encourages all to participate.

Theme 15: Visitor and Wider Market Research

Trainer's notes:

The museum needs information on its visitors and their views about it and - equally - the views of those in the local community who are not using the museum (i.e. wider market research among the general population, (see also the Marketing chapter of *Running a Museum*). Staff of the Visitor Services Team (and those taking part in Visitor Service training programmes) can assist in gathering valuable data. For example, questionnaire surveys may be drawn up (perhaps using some of the topics covered in Worksheet 36, though adapted to the particular circumstances of the museum building or gallery being surveyed).

Where more substantial visitor surveys are carried out in cooperation with either the museum's own marketing specialists or a government or outside market research agency, the Visitor Services staff will probably need to assist with this. Similarly, the Visitor Services Team should be able to give valuable assistance to wider market research studies, for example sample surveys of the local population (including non-visitors) to try to discover the answers to questions such as what proportion know that the museum exists, and what knowledge they have of its exhibits and services.

Visitor Services staff can then either ask members of the public to complete the questionnaire sheet as they go round the museum, or ask if they would allow a staff member to walk alongside the visitor, taking notes on their progress around the galleries and their reactions to what the visitor sees and experiences.

Trainer's notes:

Visitor surveys within the museum must be handled very carefully. Visitors must not feel that they are being compelled or pressured to take part, nor feel obliged to give positive replies just to please the staff. Most visitors are happy to spend a minute or two completing a small questionnaire or writing comments in a Visitor's Book, but where visitors are being asked to do more than this and spend a longer time, for example on a more detailed survey or accompanied visit, it is often a good idea to offer the visitor a free drink in the café or a small gift from the shop as a thank-you for their time and cooperation.

Such visitor and market research surveys are important methods by which the museum monitors and evaluates the standards and provisions it has put in place, and the evidence collected helps to prioritise actions for the future. Evaluation: gathering evidence that informs future planning, enables you to check and refine processes, results and outcomes, can take place at different stages of a particular series of actions.

1. At the beginning, "front end" evaluation is there to test out ideas or prototypes during the project.
2. Formative evaluation allows you to make changes or improvements,
3. Summative evaluation gives the opportunity to gather a range of evidence that summarises the strengths and weaknesses of the project so as to inform future actions.

Final remarks:

The final, and key, point in relation to this suggested training course, is to ensure that all important information and ideas for the continuous improvement of the museum and its services is both collected and interpreted accurately and clearly. This information must in turn be fed back to all those within the museum who would find the results of value and interest, including the Visitors Services Team, the Communications Group, the Senior Management Team, and the departments of the museum responsible for any particular gallery or exhibition surveyed or reviewed.

References

Running a Museum: A Practical Handbook includes both a glossary of key terms used in museum and heritage training, and an extensive bibliography including web resources.

The citations in this volume are:

Boylan, P.J. (editor), *Running a Museum: A Practical Handbook*. (Paris: ICOM – International Council of Museums.)

Durbin, G. *Developing Museum Exhibitions for Lifelong Learning*. (London: Museums and Galleries Commission.)

ICTOP, 1983. *International Council of Museums Symposium on the Training of Personnel, August 1981*. (Paris: ICOM – ICTOP).

Kolb, D. 1984. *Experiential Learning*. (London & Eaglewood Cliffs: Prentice-Hall).

Running a Museum

A Practical Handbook

**Professional Code of Ethics
Case Studies 1, 2 & 3**
The Role of Museums and
the Professional Code of Ethics

Ethics - Case Studies 1, 2 & 3 (*Running a Museum* pages 7 and 10)
Using the information and advice in *Running a Museum* pages 5
to 16, and the text of the ICOM *Code of Professional Ethics*
(pages 220 to 231), discuss in your study group the ethical
problems raised in each of these three case studies, and then
summarise your conclusions.

Ethics – Case Study 1
You have been planning for years to organise an important
exhibition in your subject but lack of funds has always
prevented this. The press and television have publicised
your need for a sponsor. To your surprise a large company
writes offering to bear the full cost of the exhibition,
subject to their name being associated with it in any
publicity. You share this good news with a colleague who
tells you that the local community are fighting a campaign
against this company because they wish to develop a site
of scientific interest which is also sacred to the first
peoples of the area. How do you proceed?

Ethics – Case Study 2
You are trying to build a representative collection in your
subject. There are a few gaps that you have yet to fill. You
also have a number of specimens of the same type which
have been given to the museum although their associations
with people and places and other material are different. A
local collector has two items which would help to complete
your collection and he offers to exchange these for the
items you have of the same type. What do you do?

Ethics – Case Study 3
You have been undertaking research on a topic to do with
your collections which will eventually provide the basis for
a major exhibition. Some of your findings provide new
evidence which is likely to attract considerable publicity for
the exhibition. Before you have had an opportunity to
publish your work or prepare the exhibition, a doctoral
student calls to study the same collections. What
information do you make available to her?

Running a Museum

A Practical Handbook

**Professional Code of Ethics
Case Studies 4 & 5**
The Role of Museums and
the Professional Code of Ethics

Ethics - Case Studies 4 & 5 (*Running a Museum* pages 11 and 15)

Using the information and advice in Running a Museum pages 5 to 16, and the text of the ICOM *Code of Professional Ethics* (pages 220 to 231), discuss in your study group the ethical problems raised in each of these two case studies, and then summarise your conclusions.

Ethics – Case Study 4
A local collector has one of the finest private collections of material relating to your subject, even though he holds unorthodox views about it. You have fostered good relations with him in the hope that your museum might benefit from this. One day he offers to lend his collection for a temporary exhibition at the museum's expense, subject to two conditions: that the exhibition only shows material from his collection and that he must be responsible for all label and publication content. Do you accept his offer?

Ethics - Case Study 5
You are a specialist in your subject and your museum encourages its staff to publish academic papers. A commercial gallery, from which your museum occasionally purchases well-documented material for the collections, is now putting on a prestigious exhibition in your subject. The director of the gallery has invited you to write an authoritative introduction to the exhibition catalogue. When you see the list of items included in the exhibition, some have no provenance and you suspect they may have been obtained illegally. Do you accept the invitation?

Running a Museum

A Practical Handbook

Examine the following list of items for a suggested collections management table of contents (from *Running a Museum:* Collections Management). Discuss these in your group and mark the boxes against those which should be included in the collections management policy for your museum. Are there any other subjects that are needed, perhaps because there is something special about your museum or collections? If so write these in at the bottom of the Worksheet.

Drafting a Collections Management Policy: Suggested Table of Contents

Museum Mission and Purpose	☐	Disaster Preparedness	☐
Code of Ethics	☐	Insurance	☐
Registration	☐	Access to Collections	☐
Acquisitions and accessioning	☐	Security	☐
Valid title, provenance, and due diligence	☐	Exhibitions	☐
Sensitive and protected materials	☐	Controlled environment	☐
Appraisals and authentications	☐	Monitoring collections on exhibit	☐
Deaccessioning and disposals	☐	Suitable exhibit materials	☐
Return and restitution	☐	Packing and shipping	☐
Cataloguing, numbering, and marking	☐	Research	☐
Inventory	☐	Field Collecting	☐
Loans	☐	In-house	☐
Condition reporting and glossary/standards	☐	Visiting scholars and researchers	☐
Documentation	☐	Destructive analysis	☐
Preservation of Collections	☐	Personal collecting and personal use of collections	☐
Collections storage	☐	Preventive Conservation	☐
Collections handling and moving	☐	Conservation	☐
Photography	☐		

Exercise 1: Examine this suggested collections management policy table of contents in the box above. What subjects are relevant for use in your museum? Are there any subjects that are irrelevant? What is special about your museum that would require the addition of other subjects? What would these subjects be? Summarise your conclusions and use these as the outline for the collections management policy for your museum.

Summarise here any additional subjects needed for your museum.

Running a Museum

Cataloguing Procedure Policy
Collections Management

A Practical Handbook

Review the cataloguing policies or arranements in your own museum and compare the current practice with the model policies and guidelines in the Collections Management chapter of *Running a Museum*, and in particular the model Procedure in Box 4 of the chapter.

Outline policy statement for Cataloging Procedure

1 General Policy: All objects are catalogued to make a record of their physical attrributes and provenance in accordance with a defined standards or classifications for each type of collection.
2 Identifying catalogue numbers are assigned and applied to all objects.
3 If the museum conducts, or is associated with, archaeological excavations and similar fieldwork, every effort should be made to integrate the field recording with the permanent cataloguing, e.g. by using the museum's accession numbering and cataloguing systems.
4 Objects are always catalogued before they are allowed to leave the museum on loan.
5 Cataloguing is carried out as soon as possible to avoid backlog.
6 Where, nevertheless, there is a backlog of accessioning and cataloguing, the museum should develop and implement a plan for bringing the cataloguing up to an acceptable standard as quickly as possible.

1

2

3

4

5

6

Running a Museum

Policy on Security of Collections
Collections Management

A Practical Handbook

Examine the following list of items for the collections security section of a suggested collections management table of contents (from *Running a Museum:* Collections Management). Against each point say whether this is already covered in your own museum's current policy or normal practice, and, summarise your arragements. If not, how can procedures be improved on each point?

Security Issues to be covered in the Collections Management Policy

1 Physical access to the collections, even for staff, is restricted by locked, secured location and controlled entry.
2 The collections staff responsible for a particular subject, collection or storage area will supervise access by both other staff and by visitors.
3 Records of staff having key access are to be kept.
4 Records to be kept of all visitors allowed into storage and other secure areas of the museum.
5 Research access is on the basis of the approved research design, and all visits are similarly recorded, appropriately at the end of the loan period.

1

2

3

4

5

Running a Museum

Reviewing the Museum's Cataloguing and Documentation

Inventories and Documentation

A Practical Handbook

(Individual Exercise): Review the current practice of your museum in relation to the recommended standards in the Inventories and Documentation chapter of *Running a Museum*. Prepare on separate sheets of paper short written reports on the current position or possibilities relating to either the whole museum, or for a particular collection, in each case for future improvements in each of the following areas:

Use the accessioning guidelines as the basis for the design of an accession summary sheet, transfer of title form and accession register.

Use the inventory and cataloguing guidelines as the basis for an internal inventory control and cataloguing handbook, with decisions on the fields and the syntax and terminology controls to be used by the museum.

Produce a report outlining the history of the collection and the availability of information about the collection.

Develop a plan for the backlog cataloguing of a specific collection.

1

2

3

4

Running a Museum

Web Information Resources
Inventories and Documentation

A Practical Handbook

(Individual or Group Exercise): Carry out a review of web sites developed by or for museums and list below the titles and web addresses of useful reference sites for museum staff, and examples of effective web sites in terms of information on the collections.

Useful reference sites

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

Effective museum web sites

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

Running a Museum

Nine Agents of Deterioration
Care and Preservation of Collections

A Practical Handbook

Review a museum building and assess the risks (particularly the form of possible loss or damage, and specially vulnerable collections) using Table 1 and Table 3 and Appendix 1: 'The Visible Facts: A Suggested Survey' of the Care and Preservation of Collections chapter of *Running a Museum*.

The Nine Agents of Deterioration

Agent of Deterioration	
Direct physical forces e.g., shock, vibration, abrasion, and gravity	
Thieves, vandals, displacers i.e. unauthorized human access and removal. 1 Intentional 2 Unintentional	
Fire	
Water	
Pests 1 Insects 2 Vermin, birds, other animals 3 Mould, bacteria (see Incorrect Relative Humidity: damp)	

The Nine Agents of Deterioration – continued

Agent of Deterioration	
Contaminants 1 Gases, Indoor and outdoor gases (e.g., pollution, oxygen) / 2 Liquids (e.g., plasticizer, grease) / 3 Solids (e.g., dust, salt):	
Radiation 1 Ultraviolet light 2 Light (Visible radiation)	
Incorrect temperature 1 Too high 2 Too low 3 Fluctuations	
Incorrect Relative Humidity 1 Damp (over 75%rh) 2 Rh above or below a critical value 3 Rh above 0% 4 Rh fluctuations	

Running
a Museum

A Practical Handbook

Case History of Museum Teamwork: Sunlight and Guards (Security Attendants)

Care and Preservation of Collections

Discuss in your group the following case study and carry out the exercise on your experiences or the possibilities of cooperation among different categories of staff in relation to the care of the collections.

A case history of museum teamwork: sunlight and guards

A curator acquires an old textile from a local family. She has wanted it for the museum collection for many years. The textile was kept in the great-grandmothers dowry chest. They have agreed to give it to the museum if it goes on display in a prominent place. She studies the wall where she wants to mount it, and notices that at this time of day a bright beam of sunlight falls on the wall. The window shutters had been opened by the cleaners, and kept open by the security guard because they want ventilation. The curator asks about closing the shutters but they complain that it will be uncomfortable while they work. She has read somewhere that light can be damaging to textiles, but she is not sure.

   Her museum is too small to have a specialist so she contacts an expert at the national conservation institute. After correspondence, he advises her that indeed, some of the colours in the textile she describes will probably fade significantly in two years if they receive two hours of direct sunlight each day, and even the indirect daylight in the room will probably cause fading in ten years. She decides to focus first on the biggest risk, the direct sunlight. She arranges a meeting with the cleaner and the guard in her office. She invites them to inspect the wonderful textile, explains its historic connection to the community, and explains the dilemma. After some discussion, the guard suggests that now that he understands the reasons, he could close the shutters for the two hours that the sun is a problem. He could move his seat to another open window without sun during that part of the day.

   During the discussion the cleaner remarks that last year, when it rained, (when the curator was on holiday) she discovered dirty water on that wall from a roof leak, but she cleaned it up. She said she did not know who to tell. Perhaps that might also be a problem? The curator realizes she must speak now to the display case maker, and the man responsible for the building roof, to solve the water risk. The cleaner and the guard feel more attached to the museum collection, and understand that they too have a recognized role to play. They are, after all, the staff who look most closely at the exhibit room every day, and their observations form a valuable part of collection monitoring.

   Exercise: Recall any teamwork experiences, positive or negative, or, if it has never happened, imagine where and when in your museum you could be involved in sharing such knowledge. Draw on a sheet of paper circles representing at least 3 or more individuals in your museum and show by arrows connecting the circles what knowledge or activity is shared. If there are organisational barriers between individuals, draw heavy lines between the two, that block the arrows. Does your museum look connected?

RESPONSE

Running a Museum

A Practical Handbook

Exhibition Feasibility Study
Display, Exhibits and Exhibitions

● ●

Factors to be assessed and taken into account in an exhibition feasibility study: (from *Running a Museum* - Display, Exhibits and Exhibitions - page 95 in English edition)

1 The objects to be displayed: availability, conservation and security issues.

1

2 The space available: size; access possibilities, including during installation and for disabled visitors when the exhibition is open.

2

3 Available staff resources: in-house staff, outside contractor or consultant, or a combination of the two.

3

4 Timing: within the museum's overall programme of exhibitions, events and other activities, time requirements for planning and installing.

4

5 Cost: estimated project budget required, including construction, transport, publicity, maintenance and dismantling.

5

6 Who should be the core exhibition team, and how this should be organised.

6

Running a Museum

ICOM
INTERNATIONAL COUNCIL OF MUSEUMS
CONSEIL INTERNATIONAL DES MUSÉES

UNESCO

A Practical Handbook

The Exhibition Team
Display, Exhibits and Exhibitions

● ●

Discuss in your working group which staff members of your
own museum might form part of the project team for a major
new exhibit or exhibition.

Administrative

Professional

Technicians

Craftspeople

Running a Museum

A Practical Handbook

Just sit and think for a moment or two. Where have you recently received good service: a hotel, a shop, on board a train or aeroplane, at a bank or perhaps a government office? What did the service consist of? How did you assess whether the service was good or not? Did you receive a welcoming smile, clear and accurate information, clean and working facilities, the sense that time was given to your query? Were your expectations exceeded?
What sort of service and experience do visitors receive at your museum? Are their expectations exceeded?

Exercise: For all staff: each staff member contributes to two lists naming the characteristics they think contributes to making a quality service and a poor service. Through discussion get agreement as to which are the top 10 positive characteristics and have these as the basis of establishing a standard all staff will support.

1

2

3

4

5

6

7

8

9

10

Running a Museum

Knowing your Actual Visitors
Caring for the Visitor

A Practical Handbook

KNOWING YOUR ACTUAL VISITORS

Actual Visitors (those who come through the door): the more you know about your visitors the better you will be able to plan ahead and prepare for them.

1. Do you know who your current visitors are?

1

2. Which of these and how many make repeat visits?

2

3. How does your current visitor profile reflect that of the local communities? Is it the same or different? Do you think that it should reflect the profile of your local communities? How many of them come on their own rather than in family or other groups?

3

4 How many are local visitors, and how many are tourists from outside the region?

4

5 Are you aware of any seasonal trends in visiting?

5

6 Are there differences in numbers and types at different times of the week/month/ year?

6

Running a Museum

Getting to Know your Potential and Virtual Visitors
Caring for the Visitor

A Practical Handbook

● ●

Getting to know your potential and virtual visitors

Either in small groups of staff, or individually, use the notes below to analyse the possibilities for turning potential visitors into actual visitors, and for developing and expanding a community of "virtual" visitors.

Potential visitors (those non-visitors who you would like to attract to your museum). They may well fit the profile of your current visitors (let us say researchers), but you are aware that many more could make use of your study facilities).

1. What do you need to do to attract new visitors or various types (e.g. scholars and researchers, families with children, organised groups from schools and colleges ?

2. Are your opening hours convenient for general visitors or special groups, such as students and researchers wanting to view the reserve collections?

3. Are details of opening hours and arrangements for special access to collections easily available?

Virtual visitors (those accessing the museum or its facilities and information through the Internet or by mail)

4   If you already have your own museum website, look at this to see how user and visitor friendly they are.

5   How many clicks does it take to get to the visitor information?

6   Is it clear from the images and the style of writing that the visitor is welcomed?

7   Does the museum recognise different needs of its visitors?

8   Does the website suggest that consciously or subconsciously the museum has a hierarchy of visitors, considering researchers first and families last?

9   If you do not yet have your own website, examine several websites of similar museums in different countries and regions, and evaluate them using questions (5) to (8) above.

10 Use these analyses to improve your own website or to prepare the specification for your future museum website.

1

2

3

4

5

6

7

8

9

10

Running a Museum

Visitor Services and Facilities
Caring for the Visitor

A Practical Handbook

Visitor Services and Facilities

As a whole group discuss the following questions:

1 What facilities does the museum offer currently? Which type of visitor is most likely to benefit from these and which type of visitor is less likely to benefit from these?

2 What facilities would the museum like to offer in the future?

3 What services does the museum offer currently? Which type of visitor is most likely to benefit from these and which type of visitor is less likely to benefit from these?

4 What services would the museum like to offer in the future?

1

2

3

4

Running a Museum

Principles and Priorities for a Museum Education Policy and Programme
Museum Education in the
Context of Museum Functions

A Practical Handbook

●●

Assessing the Principles and Priorities for a Museum Education Policy and Programme

Working in small groups, discuss what has been identified as basic questions in analysing and planning the education service according to circumstances including the following:

Concerning the geographical situation:

1. Is it serving a big or small community?

2. Are the surroundings urban/industrial or rural?

3. Does the museum relate effectively to its geographical situation?

Concerning the social and cultural structure of population:

4. What are potential visitors like?

5. What visitors and other users do we want to come to the museum and why?

6. What are the community's cultural traditions: can these be linked to the museum's objectives and policies?

7. What are the contemporary problems the community has to cope with?

Concerning museological issues:

8. What are the key features of the collections?

9. What are its origins?

10. What are the museum's obligations towards outside parties, such as the State, city, other funding bodies or donors?

Concerning finance:

11. What funding sources are available specifically for educational work?

12. What is the most effective use of the available museum education budget?

1

2

3

4

5

6

7

8

9

10

11

12

Writing Labels and Panels

Museum Education in the
Context of Museum Functions

A Practical Handbook

· ·

Writing labels and panels

In groups of 2s select a display case and write a 100 word panel intended to help the visitor to place the objects into a context.

What particular information do you think they should have?

Why?

How can you make them look closely and be amazed?

How can you make links to other cases in the gallery?

Have a group discussion around the labels: what are their strengths and weaknesses?

If you could add a drawing or a photograph to the panel what would it be of?

Why?

Group discussion

100 word panel

Running
a Museum

National and Local Laws
Museum Management

A Practical Handbook

Investigate and summarise the main national and local laws and regulations affecting museum operations and museum management

Running a Museum

Different Types of Museums in the Country
Museum Management

A Practical Handbook

List, with examples, the different types of museum, in the country in terms of their authorising, managing and funding agencies or organisations

Different types of museums based on their authorising, managing and funding agencies or organisations:

1. Government - those museums that are established and run by local, regional, or national governmental agencies.
2. Private - museums funded and operated by individuals or private organisations, possibly for commercial profit.
3. Museums of not-for-profit foundations, trusts and societies (known as "independent museums" in Britain.
4. University museums attached to colleges or universities and usually established and maintained for the educational purposes of the university, though many have an important public role as well.

1

2

3

4

Running a Museum

Policies Checklist
Museum Management

A Practical Handbook

• •

1. In relation to your museum, which of the areas of policy in the checklist above have no policy statement or document at the present time?

2. Are all the current policy documents for those areas that are already covered up to date, or do they need revising?

3. Are there any special aspects of your museum's work or responsibilities which are not covered by the checklist, which ought to have a policy statement or document?

Checklist

1. Acquisition
2. Accessioning
3. Deaccessioning
4. Collection care and use
5. Loans
6. Exhibits
7. Public programming and education
8. Human resources
9. Financial resources
10. Staff evaluation
11. Health and safety of staff and visitors
12. Facility (premises) maintenance
13. Facility (premises) use
14. Natural disasters and hazards
15. Any special provisions relating to the particular museum?

1

2

3

4

5

6

7

8

9

10

11

12

13

14

15

Running a Museum

Key Factors in relation to Employment Terms and Conditions
Managing People

A Practical Handbook

Working either in small groups or individually:

PRACTICAL EXERCISE TO IDENTIFY KEY FACTORS IN RELATION TO EMPLOYMENT TERMS AND CONDITIONS

1. Prepare a list of the main national laws and rules governing employment terms and conditions in the country.

2. If yours is a public museum, also summarise the main government regulations or agreements controlling employment conditions for your institution.

3. In addition to these do you have a Staff Handbook or Staff Agreement setting out the detailed employment procedures and conditions?

1

2

3

Running a Museum

Corporate Health and Effectiveness
Managing People

A Practical Handbook

Working in small groups, discuss frankly the present state of your own museum or other organisation (e.g. Section of a Ministry), using this checklist, and identify at least five priority areas for improvement.

CORPORATE HEALTH AND EFFECTIVENESS

Management researcher Brian O'Neill (*Professional Manager* January 1993) has found that to be successful and effective an organisation needs the following:

1. A common sense of direction and purpose

2. Well-designed jobs

3. Staff who feel they are being treated fairly, with their value properly recognised and appreciated

4. A participative style of management

5. Everyone to be kept informed of plans and events

6. Each employee should feel a valued member of a team

7. Well-designed working places and facilities

8. A shared understanding of roles

9. Everyone to be trained for the job

10. Fair opportunity for promotion

11. Leaders and supervisors who visibly show they care and are supporting

12. Staff being involved in planning change from the beginning

13. Opportunities for staff to use their skills

14. Opportunities for staff to contribute ideas.

PRIORITY A

PRIORITY B

PRIORITY C

PRIORITY D

PRIORITY E

Running
a Museum

Writing a Job Description and Personnel Specification

Managing People

A Practical Handbook

Using the examples (boxes 5 and 6) in the Managing People chapter of *Running a Museum* as models, analyse one existing job within the museum (perhaps your own or that of someone who works under you) and prepare both a brief Job Description and a Personnel Specification for it.

JOB DESCRIPTION	PERSONNEL SPECIFICATION

Running a Museum

Writing a Statement of the Terms of Employment
Managing People

A Practical Handbook

Using the model contract example in Box 9 of the Managing People chapter of *Running a Museum* prepare a brief Statement of Terms of Employment for one job in the museum. (Continue on a separate sheet of paper if necessary).

MINIMUM REQUIREMENTS FOR A STATEMENT OR CONTRACT OF THE TERMS OF EMPLOYMENT

1. Name and address of employer

2. Name of employee

3. Job title (or short description)

4. Date of commencement of appointment

5. Date on which employment ends (if for a fixed term)

6. Details of pay: initial pay rate, period and method of payment, also how pay is calculated or reviewed (e.g. by reference to an official or government pay scale or a trade union negotiated collective agreement)

7. Details of the normal hours of work and related conditions (e.g. reference to collective agreement on flexible working hours)

8. Arrangements for holidays and holiday pay

9. Arrangements relating to incapacity for work due to sickness or injury including any sick pay rights etc.

10. Terms and conditions relating to pension arrangements

11. Length of notice due to and from the employee

12. Information on disciplinary and grievance rules and procedures

13. Rights and conditions relating to trade union recognition (if applicable)

14. Full details of where employees can consult official documents relating to the employment (e.g. collective agreements on pay and conditions, disciplinary and grievance codes etc.).

1

2

3

4

5

6

7

8

9

10

11

12

13

14

Running a Museum

Five Steps in Risk Assessment
Managing People

A Practical Handbook

• •

Using the guidance notes in Box 14 of the Managing People chapter of *Running a Museum*, carry out a risk assessment for either your own working area of your museum or, working with colleagues in a group, prepare a risk assessment for a whole museum (or major part of this, as agreed).

HOW TO ASSESS RISKS IN THE WORKPLACE: FIVE STEPS IN RISK ASSESSMENT

HAZARD: means anything that that can cause harm (e.g. chemicals, electricity, working from ladders, etc.)
RISK: means the chance, high or low, that somebody will be harmed by the hazard

STEP 1: **Look for the hazards**

STEP 2: **Decide who might be harmed and how**

STEP 3: **Evaluate the risks and decide whether the existing precautions are adequate or whether more should be done**

STEP 4: **Record your findings**

STEP 5: **Review your assessment and revise it if necessary**

STEP 1

STEP 2

STEP 3

STEP 4

STEP 5

Running a Museum

Strategic Marketing Planning Analysis
Marketing

A Practical Handbook

⬤ ⬤

Meeting in small groups of staff, preferably from different departments and levels of responsibility, prepare a 'SWOT' (Strengths, Weaknesses, Opportunities and Threats) Analysis self-evaluation of the museum, with the aim of helping the museum and its staff to:

Checklist

- Identify needs in society

- Define its relation to the mission of the museum

- Evaluate its capabilities as a museum

- Assess its external environment

- Set objectives for the museum

- Select strategies for the museum

- Design curatorial, exhibition, educational and other public programmes for the museum

- Determine a future budget for the museum

- Evaluate the overall performance of the museum

SWOT Analysis

- **S**trengths

- **W**eaknesses

- **O**pportunities

- **T**hreats

Strengths

Opportunities

Weaknesses

Threats

Running a Museum

Preparing an Emergency Plan
Museum Security, including Disaster Preparedness

A Practical Handbook

Working with others in your group prepare the basic information for the Core of the Emergency Plan, as described in Running a Museum, as follows:

Checklist

a)   name and address of the museum;

b)   number of permanent staff;

c)   name of the contact person responsible for security of the museum premises (including phone number), a list of persons responsible for the protection of individual buildings, collections or sub-collections deposited on the premises, including phone numbers (both mobile and home) and e-mail addresses, if available (the phone calls and e-mails may be directed to the 24-hour attendant service of the organisation, which will then ensure further contact);

d)   information on critical spots (location of pressure gas bottles, stored chemicals etc.);

e)   location of main gas, water and electricity shutoffs with relevant instructions;

f)   location of the main control panel of the intruder detection system, fire alarm, and possibly other elements of the museum security system;

g)   nature of the deposited material with regard to its handling (volume, transportation requirements), priorities for evacuation etc.

h)   description of suitable access to the premises, including information on the quality and bearing capacity of the communication routes and individual floors of the buildings;

i)   Location of plan showing lay-out of the premises with designated escape routes

a

b

c

d

e

f

g

h

i

Running a Museum

Risk Analysis
Museum Security, including Disaster Preparedness

A Practical Handbook

Discuss within your allocated working group which of the following risks need to be taken into account in your security and safety

**Appendix 2 to the Methodological Instructions:
Simple risk analysis form**

TYPE OF EMERGENCY	FREQUENCY OF OCCURENCE	PROBABILITY LEVEL (1 to 5 /P/)	SERIOUSNESS OF CONSEQUENCES	DEGREE OF SERIOUSNESS (1 to 5 /C/)	RISK R = P x C	DEGREE OF RISK (/1 - 5/)	RANKING against priorities
Disasters within relevant distance from the building							
Floods							
Windstorms and tempests							
Extensive fires							
Heavy air pollution							
Earthquakes							
Infestation by insects, rodents etc.							
Excess voltage caused by atmospheric forces							
Illegal acts							
Common theft by visitors or staff							
Burglary							
Vandalism							
Improper behaviour by visitors, including physical violence							
Arson							
Unregistered entry							
Presence of armed persons							
Accidents and failures							
Injury of a staff member or a visitor							
Accident resulting in a leakage of chemicals							
Air conditioning failure							
Power etc. failures: electricity, gas, heating oil, district heating system							
Water supply stoppage							
Security alarm systems failures							
Security communication systems failure							
Other emergencies inside the building							
Fire							
Flooding from the water piping or heating system							
Excess temperature							
Excess humidity							
Excess light intensity							

	number of pieces	%
Number of objects in the collections that are in serious danger of being stolen (number of pieces and percentage), i.e. T1 =< T2 + T3		

Running a Museum

International Conventions and Cooperation
Illicit Traffic

A Practical Handbook

• •

Research the answers to the questions in the Checklist for museum staff and government officers (Box on page 205 of Illicit Traffic of *Running a Museum* - English edition) and report back on the date to be agreed.

Checklist

For museum staff, government officers who deal with international conventions and liaise with police and customs officers

1. Is your country party to each of the four key interntaional conventions (Hague Convention on the protection of Cultrual Property in the Event of Armed Conflcit, 1954, UNESCO Convention on the Means of Prohibiting and Preventing the Illict Import, Export and Transfer of Ownership of Cultural Property, 1970, the UNIDROIT Convention on Stolen or Illegally Exported Cultural Objects, 1995, and Convention on the Protection of the Underwater Heritage, 2001.

2. If not, find out why and try to deal with the problem so that it can become a Party.

3. Has your country participated in the work of the Intergovernmental Committee?

4. If not, establish why and propose that an active programme of participation and/or nomination for membership of the Committee is undertaken.

5. Are the customs officers familiar with the major types of important cultural objects of your country so that they can be seized if identified at customs exit points?

6. Has your Customs Service ever taken action to collaborate with a foreign customs service to assist with the return of cultural objects?

7. Are the appropriate customs officers familiar with the 4 conventions and do they know who to contact in the foreign customs services of the major countries likely to receive illegally traded cultural objects from your country?

8. Do the police know the appropriate contact at the Interpol Head Office in Lyon? Are they familiar with the special form for action requested in respect of cultural items?

9. Have they ever notified the loss of an important heritage item to Interpol?

10. How can collaboration between police, the customs and the museum services be improved?

1

2

3

4

5

6

7

8

9

10

Running a Museum

Rationale for a Visitor Services Policy and Strategy

Developing an Effective Visitor Services Team Course
(Section 3.1 of this Trainer's Manual)

A Practical Handbook

In groups of threes discuss the following and makes notes on key points raised. Selected one member of the group to report back to the whole class your responses to the questions.

1 Why should one provide a good service to visitors?

2 What are the benefits to the Museum?

3 What do you think are the underpinning principles for providing a quality visitor service?

4 Are there any topics that members of your group disagree about and why?

1

2

3

4

Running a Museum

Making the Museum Family-Friendly
Developing an Effective Visitor Services Team Course
(Section 3.1 of this Trainer's Manual)

A Practical Handbook

Look through the following checklist and decide whether your museum is family friendly or not at the moment. Identify simple practical ways in which things could be improved.

1. Are there activities, such as quizzes or special exhibits for the children to be involved with, especially during holidays? Good links with the Education staff will help to plan these. Refreshments will need to include low price items and perhaps the museum can provide a place for families and groups to eat their own picnics.

2. Washroom/toilet facilities should include basins and toilets at a lower level for younger users plus baby changing facilities for mothers. (These facilities are often combined with toilet facilities for the disabled who among other things also need more space, not least so that helpers and carers can assist them.)

3. A family with small children may bring push-chairs ("strollers"). Will these be allowed into the galleries?

4. Or can the museum provide smaller carriers or baby backpacks?

5. Other furniture may include high chairs in the café and small boxes for children to stand on so that they can see into the exhibition display cases.

1

2

3

4

5

Creating a Visitor Services Policy and Strategy

Developing an Effective Visitor Services Team Course
(Section 3.1 of this Trainer's Manual)

Running a Museum

A Practical Handbook

In groups of threes discuss the following sentences and agree how to complete each one.

Checklist

1. The purpose of the policy is to guide all staff to…

2. The goals the museum wishes to achieve for visitor services in the next 3 years are…

3. The different groups of visitors the museum currently serves are…

4. The groups of visitors the museum wishes to attract in the next 3 years are…

5. We need to know the following about our visitors…

6. We are going to do the following to find out about them…

7. The museum currently provides the following visitor services…

8. The following services could be added in the next 3 years…

9. Each section/department of the museum can add the following services…

10. The following posts are key in ensuring that visitors have a positive experience…

11. The following posts are the managers of…

12. We will know we are doing well because…

13. We will need some more training in the following areas to meet our standards…

14. The Visitor services team should meet with which other teams regularly … to discuss what…

15. What do we need to do to get us started…

1

2

3

4

5

6

7

8

9

10

11

12

13

14

15

Running a Museum

Delivering Visitor Services
Developing an Effective Visitor Services Team Course
(Section 3.1 of this Trainer's Manual)

A Practical Handbook

In groups discuss the following questions relating to the delivery of visitor services in the museum, and record your comments for the report back.

Checklist

1. Who is in the team and what are their responsibilities? Identify each type and their responsibilities e.g. telephone receptionist, shop staff etc.

2. What are the key attributes for a good visitor services staff member?

3. What would the team want to have as their standard for high quality service?

4. How would they achieve this?

5. What physical areas of the museum should they be responsible for?

6. Can the visitors identify individual members of the visitor services team? Where should they be situated?

7. What are the daily duties for each member of the team?

8. Which other museum department staff do they need to be in daily contact with and why?

9. How should visitor complaints be dealt with? Draw up guidelines for the visitor and another for staff.

10. To what extent should each member of staff have the responsibility to deal with problems and try and resolve them?

11. In what circumstances should they refer to another member of the team or a senior member of staff?

12. What staff training do you think may be needed?

1

2

3

4

5

6

7

8

9

10

11

12

Running a Museum

Communication and Information Group: Gathering Information
Developing an Effective Visitor Services Team Course
(Section 3.1 of this Trainer's Manual)

A Practical Handbook

● ●

The primary role of a Museum's Communication/Information Group is to set up mechanisms by which information is gathered, checked for accuracy and disseminated in a variety of formats to different audiences. In groups consider some or all of the following questions (as allocated to you by the session leader). Note your answers below so that you can report back to the whole group at the end.

Checklist

1. What information do you think the range of visitors using the museum want and need?

2. Where should the information be located for the use of visitors?

3. In what form should the information be? (Paper - guidebook, leaflet or other publication? Electronic? Verbal? Audio tape Guide?)

4. How much information is required?

5. Where should the information come from - both from inside and outside the museum?

6. What would you need to do in order to find out if the information is effective and if the visitor has used it successfully?

1

2

3

4

5

6

Running a Museum

Benchmarking: Reviewing the Museum from the Visitors Point of View

Developing an Effective Visitor Services Team Course
(Section 3.1 of this Trainer's Manual)

A Practical Handbook

Working in small groups of two or three museum staff at a time, visit an unfamiliar museum or other visitor attraction (heritage site, fun park, shopping mall: it does not matter whether this is a public or commercial facility), and note the various things that they feel worked well or failed from the point of view of the normal visitor.

Summarise the different findings under one or other of the following categories, adding brief notes about good practice that could be used in your own museum, and suggestions for ways in which the visitor attraction studied could be improved, where problems were identified.

Good standard

Adequate but could be improved

Failing

Running a Museum

A Practical Handbook

Checklist
from the Visitor's Point of View

Developing an Effective Visitor Services Team Course
(Section 3.1 of this Trainer's Manual)

Working in small groups of two or three museum staff at a time, spend approximately two hours in your own museum during normal opening hours, and consider each of the items in the following checklist, grading each point under the three columns shown.

	Good standard	Adequate but could be improved	Failing
General indicators:			
What are the indicators that show the visitor your museum takes them seriously and that you are concerned for the quality of their visit?	☐	☐	☐
Is there a short paragraph on all your literature/web site on a board at the museum's entrance that declares your intentions?	☐	☐	☐
Arrival:			
Is the road to the museum easy to locate?	☐	☐	☐
Are there good directional signs to the museum for car drivers and pedestrians?	☐	☐	☐
Where to park the car?	☐	☐	☐
How far is it to walk to the entrance?	☐	☐	☐
Are there spaces near the entrance for people with disabilities?	☐	☐	☐
Welcome and Orientation:			
Who welcomes the visitors?	☐	☐	☐
How do they greet me?	☐	☐	☐
Are they polite and do they give accurate information?	☐	☐	☐
Is it clear what to do on arrival and where things are: toilets, cloakroom, information desk, education rooms, galleries?	☐	☐	☐
How do I find out what is happening today?	☐	☐	☐
What is available for a family, children, people with disabilities, people wishing to carry out research?	☐	☐	☐
How long have I got before it closes?	☐	☐	☐
Is there a charge, how much, and are there any concessions for children, the elderly?	☐	☐	☐
Am I allowed to take photographs?	☐	☐	☐
Take my child around in a pushchair (stroller)?	☐	☐	☐
The galleries:			
Am I visually attracted to the displays?	☐	☐	☐
Am I drawn into the space or is it dark and gloomy?	☐	☐	☐
Can I read the labels?	☐	☐	☐
Is the lighting well directed?	☐	☐	☐
Are the galleries noisy or empty?	☐	☐	☐
Do I understand the intellectual context and content of the displays?	☐	☐	☐
Can I find out more about the exhibits than what is on the label?	☐	☐	☐
Where do I have to go to find this out?	☐	☐	☐
Can I sit down anywhere?	☐	☐	☐
Can my child learn at his level and be entertained?	☐	☐	☐
Can every one see all the displays at a comfortable height?	☐	☐	☐
How do I get from one place to another?	☐	☐	☐
Who can I ask if I have a query?	☐	☐	☐
How do I recognise them?	☐	☐	☐
Can I have a drink or something to eat?	☐	☐	☐
Are the refreshments inexpensive?	☐	☐	☐
Can I sit out doors?	☐	☐	☐
Are there toilet facilities?	☐	☐	☐

INTERNATIONAL COUNCIL OF MUSEUMS
CONSEIL INTERNATIONAL DES MUSEES

UNESCO