THE MANUAL OF MUSEUM LEARNING

Second Edition

Edited by BRAD KING
and BARRY LORD

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Acknowledgments

As with the previous edition of this book, we would like to first acknowledge the thousands of museum personnel, both volunteer and professional, who have worked for more than a century to establish our discipline, initially in the face of resistance or at least skepticism from some academics and curators, and almost always despite constrained space, equipment, and funds.

This text is also rooted in the very considerable literature on museum learning. Because the literature has grown to such an extent, the bibliography included in this volume has been limited to books and articles cited by the contributing authors—even so, it indicates the wide range of research and original thinking that is ongoing within the museum profession on this subject today.

As always, our publishers have been splendidly supportive. We are grateful to Charles Harmon, executive editor at Rowman & Littlefield, for his kind assistance, patience, and understanding.

We are especially grateful to those who have consented to be contributors to this second edition, sharing their experience, imagination, and dedication to museum learning. Some produced excellent manuscripts on very short notice. All were gracious and a pleasure to work with. Brief descriptions of each of them are provided in the list of contributors. Our thanks as well to Anne Sharpe and Kelly Henderson, both of whom assisted in preparing the final manuscript, and to Rebecca Frerotte for preparing the index.

We dedicate this book to the underpaid and overworked museum education professionals of today.

Prologue

Barry Lord

In Geneva during the summer of 2014 I discovered a museum exhibition on the role of the International Red Cross during the Holocaust. I was vaguely aware that this has been a controversial issue, but one that I had never considered closely.

The first and most important condition of my successful learning experience of the exhibition is that I was immediately impressed by its honesty and objectivity. The curators of the Red Cross International Museum who had organized the exhibition quite openly admitted their parent institution's faults throughout this historic ordeal. They showed archival documents that proved these shortcomings.

Encouraged by this confidence that the exhibition was trustworthy, I was able to learn on at least three levels:

- I learned some empirical facts, such as the selection of a relatively junior and inexperienced Red Cross official to lead the infamous visit to Theresienstadt where the Nazis succeeded in projecting an image of caring for the prisoners they were in the process of annihilating. The Red Cross deliberately did not assign more experienced officers who might have asked more difficult questions.

- I learned the rationale for those facts, such as the concern on the part of the Red Cross to preserve its access to the prisoner-of-war camps where it had been successful in alleviating suffering. Because the exhibition did not pretend that this concern in any way justified its failure during the Holocaust, I was able to appreciate it as the genuinely felt but ultimately specious excuse that it is.

- Most important, I learned to reconsider the whole issue in the broader context of what the Red Cross must be—that it has to remain impartially concerned to alleviate human suffering in all conflicts, so that it has at various times throughout its history been accused of "humanizing" the most inexcusable violence and oppression.

Of these three levels, the last is by far the most important because it is "affective learning," influencing my attitude toward and evaluation of the subject of the exhibition. Many months after seeing the exhibition, that revaluation is what remains with me.

Achieving affective learning is not always so heavily freighted with history. In the spring of 2015 at the recently reopened Cooper–Hewitt Smithsonian Museum of Design in New York, I was delighted to discover that the "media pen" supplied to every visitor could work wonders even for low-tech people as resistant to high-tech gadgetry as am I. The merest squiggle applied to a touch screen table by my wife or me evoked an image of an object in the museum's collection in which the shape of a jug, the contours of a chair leg, or the intricate pattern of a textile happened to follow the same lines as my gesture. The museum had recorded and could therefore search for every line, no matter how undistinguished, as it had digitized the images of its artifacts and works of art. The result—matching my squiggle to a far more elegant use of the same lines—was obviously fortuitous; but for me and so many other entranced visitors it revealed that we, too, could participate in the magic of design. The museum experience put us in personal contact with the simple act of drawing, discovering meaning in that drawing, and applying that meaning to a purpose.

The Cooper–Hewitt's pièce de résistance is its *Wallpaper Gallery*. Digitized images of the museum's collection are projected onto all four walls of the room in a dazzling display of wallpaper design history. But even more enticing is the application of the media pen to the touch tables in this gallery, as the visitors' gestures are transformed into wallpaper design motifs. My wife, Gail, and I watched a four-year-old calmly creating a brilliant design that was projected on all four walls at multiple variations of size and color. I had to watch closely to ensure that the child was producing the effect on her own, without help from her mother. Again, the effect was not merely to dazzle with an enchanting device, but rather to make the act of design one in which we were all discovering that we could participate. This kind of affective learning is a beneficial effect of a museum visit that can stay with visitors for a lifetime.

The first example achieved affective learning by scrupulous scholarship and careful use of documentary evidence. The second does it with the aid of a high-tech device linked to an incisively digitized image bank of the museum's outstanding collection. Either one is the result of deliberate, sensitively considered planning of the visitor experience. This book is about planning strategically to make such experiences universal.

Part I

Why: Planning Basics

Chapter 1

Introduction

Brad King

Museums are learning institutions. While this idea is not new,[1] its widespread acceptance is. Over the past few decades, we have seen a monumental shift in museums from an earlier emphasis on the preservation of collections to programming and interpretation. Today, that shift is advancing to knowledge sharing and cogeneration of learning: from the didactic, where knowledge transmission is authoritative, to the collaborative, where—as articulated so well by Ida Braendholt Lundgaard—"knowledge is up for negotiation and new experience and knowledge may emerge."[2]

"Museum education" has accordingly been superseded by "museum learning."[3] As noted in the first edition of this book, this is a manual of museum *learning* because the focus must be on the visitors who learn, rather than on the museum staff or teachers who educate.

Museums are *informal* learning institutions. Museum learning is voluntary, and affective.[4] But although "informal" learning sounds spontaneous, it does not just "happen." It certainly does not suggest that museums should take a hands-off approach to learning. Planning is required—*especially* for informal learning institutions. *The goal of this book is to provide guidance to museums in how to plan for learning in the dynamically changing environment of the early twenty-first century.*

This book is intended to help museums plan to become fully twenty-first-century learning organizations of this kind. Because the transformation will in some cases be profound, the overhaul must be from top to bottom. Careful planning is the only way forward—planning for learning on an institutional level, on a programmatic level, and on a collaborative level.

The Nature of Learning in Museums

Given the explosion of literature on the topic of museum learning in the first decades of the twenty-first century, it is amazing to think how new the scholarship around museum learning is and how little we knew beforehand. It was only in 1992 when John Falk and Lynn Dierking's *The Museum Experience* was published as one of the first thorough studies of how people actually learn in museums.[5] This groundbreaking book showed how museum visitors bring their own life expectations to museums and how, as a result, they shape their own learning experiences.

Following up in 2000 with *Learning from Museums: Visitor Experiences and the Making of Meaning*, Falk and Dierking further explored this theme, showing that learning is "a never-ending integration and interaction" of the personal, sociocultural, and physical contexts that we all carry. In museums visitors create their own narratives that are heavily influenced by personal experience, so that learning is idiosyncratic and difficult to predict, because each person brings his or her own contexts to bear on the experience.[6] This is Falk and Dierking's highly influential "contextual model of learning."[7]

Falk and Dierking further observed that such contextual learning occurs not all at once, but over time. Hence, while there is no doubt that people do learn in museums, what they learn remains idiosyncratic and difficult to predict. It often involves some form of interaction with objects on display in exhibitions, but it increasingly involves "nontraditional" forms of engagement with people and ideas, particularly if we consider the new types of public engagement "platforms" upon which content may be offered.

The influence of the contextual model of learning has been profound. As others have built on the model, our understanding of how people learn in museums has improved yet further, impacting every aspect of museums as institutions. The focus is now on knowledge sharing and cogeneration of knowledge, so that visitors are seen as coproducers of knowledge. A framework for learning is created by those with expert knowledge (curators, for example), but didactic or behaviorist approaches in which knowledge transmission is one-way and authoritative have long been superseded. Museums are becoming more participatory places—places where visitors can "create, share and connect with one another around content," according to museologist Nina Simon.[8] This is the "shared authority" model that welcomes the input of visitors and museum learners in contributing to interpretation.

So museum learning is becoming democratized. Didactic approaches are losing favor, and museums are providing audiences with the tools to educate themselves—to facilitate effective self-directed learning—so that they become active museum *users*, not passive museum *visitors*. This is because learning is most effective when it is *active* learning; those who learn best do so when actively engaged with the material.

The basic parameters of museum learning remain unchanged:

- Museum learning is *informal*, as distinguished from formal academic courses.

- Museum learning is *voluntary*, selected by the learner (or perhaps by the leader of a school or tour group of which he or she is a member).

Although museum learning is always partially cognitive, it is primarily *affective* learning, concerned with changes in the interests, attitudes, or evaluations of the learner as much as with the cognitive content. Learning is primarily affective when it is focused on our *feelings* about things—when it affects our attitudes, interests, appreciation, beliefs, or values. Of course cognition of data accompanies this affective experience—even the transformative experience of an original contemporary work of art in a museum context usually drives us immediately to want to find out who the artist is, the title of the work, its date and medium, and the circumstances of its creation. However, the essential museum learning experience is the change in our feelings, interests, attitudes, or appreciation of the subject matter due to the museum display. Because

this involves a change in these attitudes or interests, it is correct to refer to a successful museum learning experience as a transformative one.

And so we may reiterate here that museum learning is a transformative affective experience in which we develop new attitudes, interests, appreciation, beliefs, or values in an informal, voluntary context. As M. Elaine Davis suggests with regard to learning history, to passively accept others' interpretations of the past is knowledge that is borrowed rather than owned, whereas owning knowledge means having taken an active part in creating it or engaging with it, building on the basic facts to construct a narrative that is personally meaningful.[9] Expert staff is still needed to assist museum learners to create responsible understandings of the history, art, science, or whatever the topic being considered, but the key is the learner's active engagement in creating the narrative. *Planning museums for learning to a great extent consists in providing the conditions whereby learners can engage, discuss, respond, and ultimately construct their own meanings on their own terms.*

How Museum Learning Can Benefit Museums and Society

In considering the future of museums, this is a time of questioning, self-analysis, and, ultimately, transformation. There are many reasons for these trends, but the need for visitor centricity is high among them. And greater visitor centricity means, to a great extent, a sharper focus on the learning mission. As learning becomes central for museums, significant changes become necessary:

- institutional reorganization (old forms of organization will not achieve the goal and new ones are required)

- different forms of staffing (different types of job descriptions and different competencies)

- new ideas on the uses of collections

- a rethink of facility and space planning

- and, of course, adjustment of budgeting to accommodate the learning orientation of these and other museum functions

Planning is required to ensure such changes happen smoothly and effectively.

Very significantly, this is also a time of great opportunity. In terms of learning pedagogies, we are seeing convergence between museums, other types of informal learning, and civil society organizations, and indeed formal learning institutions such as schools. There are social needs that museums, along with these other organizations, can fill, and they fill them most effectively because the way learning happens in museums fits with the types of skills that are needed. Opportunities for closer mission-driven partnerships between museums and these other institutions are appearing as each realizes that the other can help achieve common goals around larger societal needs—for example, encouraging creativity, reducing bullying and social exclusion, and enhancing the skills required to be good citizens in an increasingly connected and globalized world. Museums are well positioned to teach these intangible "soft power" skills—how to think critically, how to apply contextual intelligence, and how to engage with others who may not agree with you.[10] Museums are therefore becoming civil society institutions with a social responsibility, along with partner institutions with similar missions.

As Barry Lord said in his introduction to the first edition of *The Manual of Museum Learning*, "museum learning is a vital component of the lifelong learning that we now perceive as essential to the development of both the individual and his or her society." Creativity—one of the skills engendered by museum learning—is recognized as the key to success in the twenty-first-century economy. Especially since the publication of *The Rise of the Creative Class* by Richard Florida in 2002,[11] governments and institutions of all kinds have worked to develop the creativity of their youth and to encourage creative enterprises to take root. Arts centers, creative commons, and innovation centers have sprung up in major cities and small towns, all focused on the idea that a workforce with the ability to think and work creatively will be best positioned to succeed and thrive.

Studies have shown that youth exposed to material culture in museums are more likely to become well-educated and productive citizens.[12] For some types of museum visitors, such as those who come in school groups, there will be state-mandated curriculum and learning outcomes. This presupposes partnerships with others involved in the educational enterprise—schools, universities, colleges, and governments that have an interest in not only ensuring a match between school and museum curricula and learning outcomes but also in ensuring that citizens are well prepared for economic success and social stability. If museums are to contribute to larger social goods in partnership with other institutions, then planning for learning programs cannot "end"—they must be revisited periodically and constantly updated as conditions and priorities change. The "big picture" goals must be kept in mind and revisited constantly as part of museum strategic planning processes.

A learning-centered approach can serve the museum as well. Instead of focusing on the volume of visitors obtained via a blockbuster exhibition or some new "wow" technology, a learning-focused institution seeks to become more like a neighborhood library, a place where visitors not only come to be entertained (there is certainly a place for this) but also where they come to use the museum as a resource in their communities. An example is the Columbus Museum of Art, the experience of which is highlighted in chapter 8. The emphasis chosen in Columbus was to make the museum a place for local people to use on a regular basis. Learning was planned as part of a larger strategic overhaul of the institution to make it a reality in the Columbus community.[13]

Many museums around the world are now engaged in the work of institutional change for learning, and some of their experiences are described in this book. In our search for real-world examples of the changes, we have asked both museum and nonmuseum people to contribute, reflecting the convergence of pedagogies between museums, schools, and other civil society organizations as they are manifested in new trends and ideas, reflecting as well their compatibility and convergence with the informal nature of museum learning. Museums are partnering with and connecting with these trends and their representatives like never before. We very much hope that the fresh perspectives they offer not only enrich the book and enhance its usefulness but also drive forward the common mission of museums and other institutions as they join forces to put the power of informal learning toward the service of society.

Why a "Manual of Museum Learning"?

Our profession's understanding of the benefits that museums can provide for themselves, their visitors, and society at large has profound implications and offers a huge opportunity. But it is not necessarily an easy proposition. Becoming a participatory museum where some authority over interpretation of material is ceded can be difficult, and is by no means completely resolved within

the profession. Any process intended to assist a museum to transform itself into a more complete learning institution has implications that are likely to engender resistance. Strategies for dealing with such resistance—and other issues that threaten the ability of museums to accomplish such a transformation—are considered in the pages of this book through the real-world experience of museums that have gone through it. A well-considered process, when properly designed and implemented, can establish a consensus and ease concerns.

Our approach in this book is therefore both *strategic* and *institutional*. It is about how museums can manage the *process* of change as much as the trends and changes in and of themselves. It is not about planning educational programs per se; most established museums are deeply involved in planning innovative and targeted learning programs for their audiences and already possess that expertise. Rather, the focus is on planning for learning in the context of larger institutional goals, so that the actual design and implementation of initiatives or programs corresponds not only with the overall strategic direction of the museum but also with actual community needs, financial and staffing resources (or resource limitations), available facilities, and overall institutional capabilities. If learning is to be central to the museum's reason for being, then the institution as a whole needs to be realigned in all aspects. The book will hopefully assist with imagining learning as central to the overall vision and mission of the museum, helping to align all functions with the central learning mission. By incorporating planning for learning within the context of institution-wide planning, the book aims to fulfill its role as a "manual."

Who is this book for? First, and most obviously, it is for *all* museum staff members. While many programmers, interpreters, and other front-line educational and learning staff are likely to benefit from the book's case studies, best practices, emerging trends, and planning advice, the book is also for those working in museums who are not directly involved with learning programs. As museum institutions become more integrated as organizations, it is important that staff in each functional area understand the goals and practices of others in the same organization. In that the book provides a high-level view of learning within the larger scope of institutional planning, we hope that it will benefit museum leadership as well as leaders in other functional areas who might be involved in high-level institutional planning.

The Manual of Museum Learning is also a textbook and is therefore intended for students of the profession as well, and in the service of that goal it brings together in one place the very best of museum learning practice. Moreover, it is intended as a different kind of textbook. In the past, textbooks in the museum field have historically corresponded to function; there are texts intended for curators, for managers, and for educational programmers. But there are few textbooks that integrate learning with the whole museum. The goal of this book is to provide a textbook that is in tune with the structural changes that have occurred in museum organizations, where many traditional means of organizing museum work are being reconsidered, or even passing out of existence. At a time when museums are creating positions such as "Director of Audience Engagement," texts are required that recognize that older staff titles and roles are being superseded.

More broadly, those working in schools and other civil society institutions that have the same learning goals as museums, and who are using similar pedagogical approaches, can also benefit from this manual. In researching this book, it has been striking how similar many of these goals are. The current focus on "softer" skills such as communication, creative thinking, and citizenship is vital, particularly for children and younger audiences, in developing citizens capable of contributing to twenty-first-century society while mitigating modern social problems such as alienation and social exclusion.

Finally, this book is also for those new to the concept of museum learning. Its approach encourages those who are contemplating the development of completely new institutions to ensure that learning is fully integrated into the museum's "DNA." In addition, those working in parts of the world where museums are just now moving beyond the former centrality of exhibition and curatorial functions will benefit from this comprehensive approach to museum learning.

How This Book Is Organized

As with the first edition, this manual is organized in three major parts, but with a few significant changes:

- **Part I: Why: Planning Basics.** In the first edition of this book, the "Why" section outlined the rationale for museum learning. In the years since that first edition was published, the rationale has become self-evident, so this second edition focuses on the reasons for making museum learning central to institutional strategic planning.

- **Part II: What: A Framework for Museum Learning.** This section discusses current approaches to museum learning and key trends and directions. Whereas the first edition's second section discussed participants in learning, this edition's focus on planning sets the stage for the "How" section to come via a comprehensive overview of the ways in which learning has been reimagined as a comprehensive endeavor in museums around the world.

- **Part III: How Transforming the Museum into a Twenty-First-Century Learning Institution.** In the first edition the final "How" section discussed resources for learning and how such resources could be used to serve the museum's publics. This second edition considers these resources as well, but it reorients the discussion toward the details—institutional reorganization, staffing and budgeting, facility planning, and the like. We also consider the public side, discussing the various platforms for public programs and how they are being planned and implemented. The book concludes with a summary that draws out key ideas for the successful development of a strategic and holistic approach to planning for museum learning.

Notes

1. An interesting overview of the history of museums as learning institutions appears in Katie Stringer, *Programming for People with Special Needs: A Guide for Museums and Historic Sites* (Lanham, MD, and London: Rowman & Littlefield, 2014), 1–5.

2. Ida Braendholt Lundgaard, "Learning Museums and Active Citizenship," in *Museums: Social Learning Spaces and Knowledge Producing Processes* (Copenhagen: Danish Agency for Culture, 2013), 11.

3. Eilean Hooper-Greenhill, *Museums and Education: Purpose, Pedagogy, Performance* (Abington, Oxon, and New York: Routledge, 2007), 4.

4. Barry Lord, "What Is Museum-Based Learning?" in *The Manual of Museum Learning*, 1st edition, ed. Barry Lord (Lanham, MD, and Plymouth, UK: AltaMira Press, 2007), 15.

5. John H. Falk and Lynn D. Dierking, *The Museum Experience* (Washington, DC: Whalesback Books, 1992), and *The Museum Experience Revisited* (Walnut Creek, CA: Left Coast Press, 2013).

6. John H. Falk and Lynn D. Dierking, *Learning from Museums: Visitor Experiences and the Making of Meaning* (Lanham, MD, and Plymouth, UK: Altamira Press, 2000), 11.

7. Falk and Dierking, *The Museum Experience Revisited*, 26.

8. Nina Simon, *The Participatory Museum* (Santa Cruz, CA: *Museum 2.0*, 2010), ii.

9. M. Elaine Davis, *How Students Understand the Past: From Theory to Practice* (Walnut Creek, CA, Lanham, MD, and Oxford, UK: AltaMira Press, 2005), 196.

10. Gail Lord and Ngaire Blankenberg, *Cities, Museums, and Soft Power* (Washington, DC: The AAM Press, 2015).

11. Richard Florida, *The Rise of the Creative Class and How It's Transforming Work, Leisure, Community, and Everyday Life* (Cambridge, MA: Basic Books, 2002).

12. Cultural Learning Alliance, *ImagineNation: The Case for Cultural Learning* (2011), 9, http://www.cultural learningalliance.org.uk/images/uploads/ImagineNation_The_Case_for_Cultural_Learning.pdf.

13. Nanette V. Maciejunes, "The Director's Perspective: A Changing Paradigm," *Journal of Museum Education* 39, no. 2 (July 2014).

Chapter 2

Planning Strategically for Museum Learning

Brad King

Planning for museum learning means designing effective, user-centered education programs, but it also means significantly more. To transform a museum into a fully twenty-first-century learning institution, deeper changes are required: to rethink and realign its functions as well as its organizational structure, departmental responsibilities, and staff roles. In the twenty-first century, museums are "going all the way" and are fully embracing what it truly means to be a center of learning and a peer institution to schools, universities, colleges, and other forms of learning organizations.

Planning strategically for learning is the subject of this chapter. Becoming a fully learning-centered institution is a strategic decision, the high-level outcome of a strategic planning process. Transforming an institution is a comprehensive exercise that requires a comprehensive approach. Here we examine the basic constituents of good learning institutions, the fundamental characteristics of a process of transformation, and some potential strategic directions that museum organizations may consider.

Characteristics of Museum Learning Institutions

What does a learning-centric museum actually look like? Much has been written about this subject, and many of these works are referenced in the text. But when distilled down to the basics, there are several key points:

- *Learning is encoded into the vision and mission of the institution.* The vision and mission are key foundation statements, and everything a museum does should stem from them. They are living statements, to be consulted time and time again as guides, and to be revisited on a regular basis via the strategic planning processes that museums usually undertake every three to five years.

- *The museum is visitor centric, with visitors at the center of everything it does.* Museums are for people first and foremost. Collections remain at the heart of museums, but their value can be realized only when they are effectively interpreted to museum users. Visitor centricity

includes many other things, both large and small, but all stem from an institutional culture that is geared toward service to the public.

- *All staff are potential learning resources for visitors.* Learning is part of the job description of staff in curatorial, public programming, exhibitions, marketing, and senior management positions. This is a major shift, but one that is increasingly seen in museums around the world. It means that there are no silos in the museum, and while front-line staff with day-to-day interaction with visitors will obviously shoulder most of the load, other staff should be able to function as learning "ambassadors" for the museum; more important, their work should ultimately be oriented toward enhancing visitors' learning experience.

- *Opportunities for learning are found throughout the museum experience*—in the museum's building, in its outreach programs, in its virtual presence, and in its retail store—actually or virtually, everywhere.

These four fundamental characteristics become part of the DNA of the institution.

Strategic Planning for Learning: The Basics

A strategic planning process should be the first step in any institutional transformation. Strategic planning is about bringing the many functions of a museum into alignment around common goals. There are no right or wrong answers in strategic planning; what is right for one institution may be wrong for another. To achieve realignment of all institutional functions in a way that "fits" the individual museum, a kind of institutional soul searching that occurs during strategic planning is required, and in some cases what it reveals can be uncomfortable. But those with the courage to see it through are usually rewarded in terms of a renewed sense of mission and a revitalized institutional vigor.

Strategic planning processes may take from six to nine months to complete. But the level of institutional transformation we are planning for will be ongoing. It is a long-term process that requires long-term commitment from the Board through senior leadership to all personnel. Change needs to take place across the entire team. Values and assumptions about what is known or not known are questioned, and indeed, the questions themselves are often reformulated, as can be seen from some of the examples and case studies in this book.

The "how to" of strategic planning processes has been the subject of other books,[1] and there is no need to reiterate the process here. But it is worth noting several key characteristics that are particularly relevant to planning for museum learning:

- *Grass roots and team driven*—to ensure full "buy-in" among all staff, initiatives need to come from inclusive staff working groups rather than be imposed from the top down.

- *Reflective and iterative*—constant evaluation of new initiatives and adjustment in a regular feedback loop to keep things moving forward.

- *Communicative*—constant and regular communications in the form of meetings, conversations, workshops, and other forums keeps momentum going, keeps everyone engaged, and keeps the long-term goal firmly in view.

Those who have shepherded their institutions through change with such pervasive character-istics note that there is no such thing as being "finished." The process becomes a goal in itself. The mechanisms put in place to encourage a team-driven and collaborative approach keep the organization moving in the direction of change. These characteristics typify not only the process, but also the way things should be done after it is complete. They epitomize a structural change in the museum's institutional culture. These characteristics encourage the connectedness and creativity that can keep the museum on the cutting edge as a learning institution.

Museum "Personalities"

In the past, "education" was considered just one of the multiple museum functions, usually un-der the broad rubric of interpretation or programs and communications. Now a learning mission can thoroughly infuse a museum's "personality." By means of a strategic planning process for museum learning, a range of possible approaches to this mission may emerge. Thinking about museum "personality types" can yield approaches to learning engagement that take advantage of an institution's strengths. While many or most museums can apply all or some mixture of the approaches outlined here, such a process may inspire staff to think creatively about their learning programs and stimulate discussion:

- One personality type is that of the *lecturer*—an approach that recalls the traditional didactic form of museum learning. Museums that are primarily lecturers may be curatorially driven institutions that value expert knowledge. This represents a top-down approach that has fallen out of fashion in recent years but which still may be applicable to some museums or program types.

- A more current approach is the *collaborator*—museums that see their visitors as partners in knowledge generation. An example would be a museum that facilitates learning by en-abling cocreation and other types of visitor feedback into exhibitions and programs, where museums draw knowledge from audiences and distribute it—sometimes in processed form, sometimes raw.

- *Facilitators* can encourage learning by providing a forum for dialogue and discovery. These museums function as crucibles for creativity, bringing together visitors and subject matter experts with varying points of view to stimulate dialogue and new ways of seeing. Dialogic learning is very much in vogue currently; as Abigail Housen argues, "The most effective experiences for stimulating aesthetic development are question-based, give the learner repeated opportunity to construct meaning from different points of view, take place in an environment that supports looking in new and meaningful ways."[2] Housen further states that learning facilitation is therefore based in the idea that educators should facilitate the learner's process of discovery, and it is indeed this stance that many museum education programs now take.

- Another approach is for the museum to function as a *connector*—facilitating learning by connecting communities, people, and organizations, and facilitating learning (and growing museum-going cultures) by maintaining a conversation with the public. In other words, mu-seums are a bridge between people and organizations, resources, or other people. This also includes setting the stage for self-directed learning—enabling people to learn on their own and to use the tools that the museum offers.

It is important to note that at times the lecturers, collaborators, facilitators, or connectors can be people who are not museum staff—classroom teachers, for example but rather those who use the museum's resources. Some other organizations assist nonmuseum professionals to use museums in the most effective way possible, such as the American company Visual Thinking Strategies that develops approaches that can be used by teachers to facilitate discussions around artworks.[3] But clearly the museum is the indispensable partner in the enterprise.

It should also be noted that, regardless of any one museum's particular personality, facilitating learning can serve individual as well as group visitors. While pedagogies such as dialogic learning have proven to be extremely effective, some have argued that solitary learning can be just as beneficial as group learning, although in different ways.[4] So many of the needs of today focus on the shared experience, but the reality continues to be that many visitors come on their own, and even if they are accompanied by others their experiences are solitary. Giving people the tools to learn on their own is just as important as facilitating learning in groups.

Key Planning Considerations

There are a number of key planning questions and considerations that should be considered as part of any transformational change, and they are exemplified in the chapters that follow.

The Organizational Model

Museums' traditional organizational models were relatively straightforward and determined by function. Administrative, facility management, public programming, and curatorial functions were (and sometimes still are) found in separate departments that work collaboratively but often independently.

Today museum organizational structures are more likely to be designed to encourage creativity and knowledge generation. New ideas about the proper functions of museums are being reflected in their departmental designs. Organizational cultural change can make a real difference in how a museum engages with its communities. An example is the Oakland Museum of California, which from 2010 to 2011 went from a typical silo-based organizational structure to one that put visitors at the center; all functions support visitor needs, and unlike most organizational charts the Board and director are at the bottom, because their role is to support staff in their work of servicing the public. As with other aspects of transformation, the process of organizational change was collaborative and inclusive.[5]

Staffing and Operations

Changes in the organizational model usually mean changes in staff roles and titles. Traditional staff competencies in program development or museum marketing or collection stewardship all worked fine under old organizational models, but new kinds of job descriptions are needed if process-oriented knowledge sharing and generation is the goal. Training may be needed to ensure that staff are fully capable of delivering the programs being implemented.

Apart from new competencies, new work processes for staff may be needed as well as alterations in operating procedures. Work processes emphasizing collaboration, communication, and constant openness to new approaches and new ideas are part of the "software" that makes an

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innovative learning organization tick. Such processes can also aid partnerships with the staffs of external organizations. The goal is a creative crucible of ideas as well as efficiency in operations. Museum operations may also need to be rethought; for example, hours of operation may need to be adjusted to accommodate people working 9 to 5, marketing approaches might need to be changed, and other operating procedures may be redesigned to make the museum visit a more effective learning experience.

Exhibitions and Other Public Programming

Exhibitions will remain a mainstay of the museum for the foreseeable future. They have always been a key part of museum learning, and in many instances they have transitioned from the didactic to the participatory in order to encourage knowledge sharing and debate.

While exhibitions, both of permanent collections and temporary or traveling shows, are still perhaps the primary means of communication with visitors, they are now accompanied by a host of other means of engagement that go beyond the gallery experience itself. Access to social media, mobile apps, and other emerging technologies enables anyone to create, share, and comment on content. Rather than disseminating knowledge to their visitors, museums are sharing authority with members of the public with regard to the information they present in their exhibitions and programs. By planning for visitor participation in their exhibitions, museums can transform the relationships they have with their audiences, bring in new audiences, and find opportunities for collaboration that will extend far beyond a single exhibition. Designing and planning exhibitions with sensitivity to these issues is enhanced by thorough front-end, formative, and summative evaluation processes.[6]

Revenue Generation

Twenty-first-century learning museums have the same revenue generation needs as their twentieth-century counterparts did, made more serious by a continuing decline in many governments' levels of support for their museums. Generating revenue is obviously a means to an end. Without adequate funding, it is impossible to achieve the museum's mission. But becoming a learning organization can open up new possibilities for funding.

This is especially true when it comes to contributed revenue. Maximizing earned revenue continues to be an important goal for museums, but for many collection-focused institutions the upper limit appears to be between 30 percent and 40 percent of annual operating expenditures (although some museum types, such as science centers, will reach levels of 50 percent and above). Transforming a museum into a learning institution shifts the focus somewhat toward maximization of contributed revenue, or provides the opportunity to do so, by generating greater appeal with private and public funding sources or with foundations or other institutional or corporate partners that share similar educational goals. For example, a museum about the environment can partner with other types of organizations with the same concerns and tap into funders that are supportive of this type of learning mission. Looking outward is crucial here: if a museum can demonstrate a positive real-world outcome from its activities, the potential for funding from contributed (as well as grants and other government sources) is improved. While American museums are generally quite advanced when it comes to contributed revenue, museums in other countries are just beginning to tap into this potentially fruitful revenue source.

Budgeting and Resource Allocation

Budgets will be profoundly affected, and resource allocations may change drastically. For example, much more may be allocated to facilitating collaborations with learning partners, while less may go to another function such as marketing or conservation. This is obviously a potential minefield for the institution, an area fraught with pitfalls, obstacles, and conflict—which makes a careful and comprehensive strategic planning process all the more important.

Facility Uses and Space Configuration

Space planning for learning is a huge consideration. Perhaps the museum is considering specific types of learning programs based on pedagogies such as "blended learning," which require access to computers as well as staff. Perhaps spaces need to be rethought in order to maximize opportunities for informal contact between staff and visitors. Or perhaps back-of-house space is inadequate to allow for the kinds of staff interactions that are needed to develop creative programs. Whatever the case, physical space does affect learning, and vice versa. Space implications of the learning strategies that emerge from planning need to be carefully considered.

Current thinking around space planning for learning is becoming even more sophisticated. As planners Andrew Harrison and Les Hutton have written, understanding space as both innovative and integrated "landscapes" for learning can make learning more effective.[7] Innovative spaces that serve the learning needs of the institution are of course desirable, but what really interests Harrison and Hutton is integration—not merely integration of spaces within a single building (although this is important), but integration of distributed spaces for learning across geography and institutions (both physical and virtual). In planning for museum space in an era where deeper collaborations between different types of learning organizations are becoming possible, this idea raises intriguing possibilities and, naturally, poses interesting problems. It is not difficult to imagine innovative spaces that encourage staff collaboration and stimulate creativity, but thinking of learning spaces in a distributed way—among different organizations in different locations—requires a whole other approach. Harrison and Hutton's "community learning model" looks much like the direction in which many museums and other learning organizations are proceeding today.

A museum's organizational model, staffing and operations, exhibitions and other public programming, revenue generation, budgeting and resource allocation, and space planning for learning are some of the most important issues that the institution must tackle in order to successfully navigate a planning process designed to reorient its practice toward maximizing its potential as a learning organization. The subsequent chapters of this book consider these and related planning needs from a practical perspective.

Notes

1. See, for example, Gail Dexter Lord and Kate Markert, *The Manual of Strategic Planning for Museums* (Lanham, MD, and Plymouth, UK: AltaMira Press, 2007).

2. Abigail Housen, "Art Viewing and Aesthetic Development: Designing for the Viewer," Visual Thinking Strategies, http://www.vtshome.org/research/articles-other-readings.

3. See Visual Thinking Strategies, http://www.vtshome.org/.

4. Jan Packer and Roy Ballantyne, "Solitary vs. Shared: Exploring the Social Dimension of Museum Learning," *Curator* 48, no. 2 (April 2005): 177–92.

5. See Lori Fogarty, "Silo-Busting: Transforming the Rake into the Flower," presentation to the 2013 National Innovation Summit for Arts + Culture, http://artsfwd.org/summit/session/transforming-organizational-structure/.

6. Barry Lord and Maria Piacente, eds., *The Manual of Museum Exhibitions*, 2nd ed. (Lanham, MD, and London: Rowman & Littlefield, 2014), 34–37.

7. Andrew Harrison and Les Hutton, *Design for the Changing Educational Landscape: Space, Place and the Future of Learning* (Abington, Oxon, and New York: Routledge, 2014).

Chapter 3

Planning for Informal Learning

Understanding and Simplifying the Interpretive Process

Jennifer Shepherd

In the first edition of *The Manual of Museum Learning*, Barry Lord highlighted three new realities at play as we approach museum learning today:

> First, museum learning is *informal*, as distinguished from formal academic courses. Second, museum learning is *voluntary*, selected by the learner (or perhaps by the leader of a school or tour group of which he or she is a member). Third, although museum learning is always partially cognitive, it is primarily *affective*, distinguishing it from the type of learning that takes place by studying print sources in a library or searching on the Internet.[1]

Of these three adjectives, the term *informal* can serve to enlighten our approach, but it can also stymie our attempts at understanding and practice, especially if we define informal learning simply as something that takes place outside formal education and its institutions. But Lord's comments are spoken in the broader context of his main point that museums provide transformative experiences for people in which they can change in some way based on what they have encountered.

A successful informal learning paradigm for a museum context is one that serves this larger goal of offering transformative experiences for people. The task becomes manageable and effective when we realize that informal learning is about helping people understand and recognize what they believe about what they encounter and how the encounter makes them feel. Since each person is different, planning for informal learning within the museum context requires that we understand the many ways people can and do interpret the information we provide, that we learn to offer different interpretive options for them at that point of encounter, and that we educate learners on their choices. In other words, we have to be able to tell more than one compelling story about an artifact, a specimen, a work of art, an event in history, or a biography so that people can discover the story that means the most to them, and begin to understand why that story makes the most sense to them.

What Is an Informal Learning Paradigm for Museums? What Are We Trying to Do?

Museums are embracing their status as informal learning institutions. Informal learning is a fluid and ongoing category that is still seeking formal definition, structure, and application within the academic world. Many paradigms have been offered, and these share a common starting point: the elements of informal learning must stand in contrast to formal learning paradigms.[2] This is an unfortunate starting point because it automatically invites a dualistic approach to the learning experience in both context and content. In context, informal elements are set in opposition to formal elements: self-directed vs. prescribed, situational vs. organized event, and tacit vs. external specification of outcomes. This opposition implies that informal learning does not need planning, organization, or measurable outcomes—whereas in reality, quite the opposite is true. In content, the formal pursuits of education such as standardized objectives, tests, and critical-thinking skills tend to be abandoned in favor of subjectivity and experiential learning. Once again, this misleading contrast suggests that informal learning has no objective conclusions.

There are clear differences, but once this dualism is established, we are left with the unenviable, nearly impossible task of attempting to identify, cater to, and provide situations conducive to the myriad of ways people learn informally every day in every moment in every situation in every context. How many scenarios can we possibly envision based on this dualistic approach? Someone would have to be as brilliant as Alan Turing to break this Enigma code. So we have to ask ourselves, "Can there really be such a thing as a paradigm for informal learning?"

I believe there is, but it does not come by defining informal learning as if it lacks formal elements, measurable objectives, or a set of requirements. A simple example demonstrates this point. Pinnacle Peak Patio in Scottsdale, Arizona, is renowned for its delicious mesquite-broiled steaks; its casual, informal Western atmosphere; and its "No Necktie Policy." This tradition was started one night when a Phoenix executive came in for dinner. The original owner, wanting to keep the atmosphere in his restaurant casual and informal, told the executive, "Either you take that tie off, or I'll cut it off." The executive did not take heed and was appalled when the owner pulled out a butcher knife and promptly cut off the offending cravat.

Wanting to be recognized as a victim of this absurd policy, the executive demanded that his tie be prominently displayed for all to see. The necktie was stapled to the rafters along with a business card identifying its victim. Over the years, the restaurant has cut over a million neckties from unsuspecting customers.

The formal elements of the informal policy are clearly there in context and content. Pinnacle Peak has a prescribed dress code (anything but neckties) that requires external outcomes (no neckties) and achieves a standardized objective (no one is wearing neckties). You can choose to dress however you like (options). Pick any option you like (choose). If you wear a tie, we will cut it off (educate).

The formal elements of an informal learning paradigm can be understood in this way. Give people options. Let them choose. Educate them on their choices. It is the third element in this paradigm—the larger goal of education—that we will consider for our paradigm, since it is often overlooked in many practices of informal learning yet is essential if people are to learn something about themselves.[3] Mark Smith laments, "A focus on learning is important, but when it is at the cost of thinking about education (and the values it carries), then a grievous disservice is done to all involved. Learning is a process that is happening all the time; education involves intention and commitment."