

SHARING KNOWLEDGE: A TOOLKIT

A practical guide for museums based
on the Monument Fellowships from
the Museums Association

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THE · MONUMENT · TRUST



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This Toolkit explains how your museum can improve the way it shares and sustains collections expertise. It is based largely on what the Museums Association (MA) has learned from four years of running Monument Fellowships.

Funded by the Monument Trust, the Monument Fellowship programme was a pioneering scheme to enable recently retired collections specialists to share their expertise with the museum they worked for and the wider museum community. The advice here is based on practical experience and much of it can be implemented at low cost.

This guide also benefits from knowledge the MA has learned through other programmes, particularly the collections reviews that form part of Effective Collections, funded by the Esmée Fairbairn Foundation, and elements of Smarter Museums, funded by Museums, Libraries and Archives Council (MLA).

Monument Fellowships focus on sharing knowledge between people, and encourage participants to complement this with better recording of knowledge in publications or databases. One of the great pleasures of the scheme has been the involvement of so many enthusiastic and inspirational people – the Fellows themselves and also the colleagues who learnt with or supervised them. The museums involved are in good hands; their staff know they need to better understand their collections so that they can bring them to life and use them for public benefit.

It's also been a great pleasure to work with the Monument Trust. In fact, the Monument Fellowships have been a true partnership between the trust and the association. The specific idea for them emerged during a conversation I had with Patricia Morison from the Monument Trust. Without her, the Fellowships never would have happened. She has been involved throughout, attending selection panels and wholeheartedly supporting and encouraging the programme.

The success of the Monument Fellowship scheme, like that of several other MA programmes, has been in large part due to the skills and commitment of Lucy Shaw, who tirelessly managed the programme as a whole and added so much to the quality and impact of individual Fellowships.

At the time of writing, in Spring 2011, the Monument Fellowship programme is drawing to a close. This Toolkit, aimed at individual museums, is part of its legacy. Another legacy is a related piece of policy work, in which the MA is looking at how the museum sector as a whole could improve the way collections expertise is shared between museums, specialist groups and individuals. The greatest legacy of the Monument Fellowships is, of course, that the Fellows' expertise has been sustained by being shared with others.

Maurice Davies
*Head of policy and communication,
Museums Association*

FOREWORD

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Thanks are due to the Monument Trust, whose funding for this scheme has facilitated such new ways of working and new approaches in the sector to capturing and sharing collections knowledge.

This has been one of the most rewarding projects I have worked on, as I have seen people grow and flourish through sharing knowledge and passion for collections. A relatively small investment of partnership funding has reaped rich returns for the museums involved and sharing the successes all round has been a delight.

Two individuals must be thanked for their work in shaping the scheme. The original structure of the scheme was conceived by Helen Wilkinson, with further development from Nikola Burdon. Both Helen and Nikola have made a significant contribution to raising the profile of collections knowledge within the museum sector and we are delighted to thank them both for the important role they have played in turning the scheme into what it is today. We must also thank Helen for writing and editing this Toolkit, Caitlin Griffiths for her input regarding inclusive working practices and Sally Cross for additional information on collections review.

Other sector colleagues who have helped us include Gaby Porter, who designed and facilitated the Monument Fellowship networking events as well as producing the handout included here in Appendix 3, and the members of the assessment panel who helped the MA make the funding awards: Patricia Morison, Diane Lees, Steve Garland, Margaret Greeves, Mark O'Neill, Kate Arnold-Forster, Ellen McAdam, Helen Wilkinson, and Maurice Davies.

And of course, thanks are due to all the Monument Fellows, their host museums and colleagues who have shared their stories, experiences, advice, guidance and ideas so willingly. Their enthusiasm and commitment have been infectious, making this a real gem of a project to be involved with.

Lucy Shaw
Museums Association



ACKNOWLEDGMENTS



1. Collections knowledge

The MA believes that what we know about collections is as important as the objects themselves – knowledge about collections is the key to unlocking their potential and to making them accessible to as wide an audience as possible.

Responses to a consultation carried out by the MA in 2008 suggested that many people who work in museums want to find ways to undertake more research, share knowledge more effectively and enable the next generation of people working with collections to develop in-depth knowledge of them. To this end, the MA believes that museums and their funders should invest more resources in developing and sharing collections knowledge.

The MA wants to encourage people who work in museums to share their knowledge more effectively and its Monument Fellowship programme, which ran from 2007–11, highlights the importance of collections knowledge and offers a practical exploration of different approaches to knowledge sharing.

2. Sharing knowledge: a Toolkit

This Toolkit has been designed to offer the sector a handy how-to guide to help collections specialists improve how they share collections knowledge and skills, to help museums address succession planning and to provide a benchmark for good practice for both organisations and practitioners.

It is based on our learning from the Monument Fellowship scheme as well as our wider collections work, which challenges and supports museums to make better use of collections and collections knowledge. We hope that the Toolkit will debunk myths around who holds onto knowledge in museums as well as encouraging and inspiring people to develop and share collections expertise. Practical and straightforward guidance, advice, case studies and checklists make the Toolkit accessible to any user who wants to discover more about collections knowledge and explore how to access and use it.

The case studies are all taken from Monument Fellowship projects and demonstrate how simple yet effective sharing collections knowledge can be. They provide examples of good practice and ideas for ways of working, and demonstrate how small step changes can yield rich rewards for all involved. The checklists provide nifty summaries of simple, low cost but effective techniques for knowledge sharing and offer a quick way in to the content of the Toolkit.

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The next section, Setting the scene, provides an informative background summary of the Monument Fellowship programme and sets a fascinating historical context to the evolution of the museum sector's approach to collections knowledge. Times may have changed from the perceived 'golden age' of specialist expertise 20 or 30 years ago but museums still need knowledge – different kinds of knowledge, and new ways of sharing it.

The main section of this document, Sharing Knowledge: a Toolkit, sets out how museums can create an organisational culture and working environment that encourages knowledge sharing. It offers examples of simple techniques for sharing knowledge and exploring ways in which the Monument Fellowship model might be adapted to use by individual museums.

Appendices provide a history of the Monument Fellowship scheme and set out useful templates and guidance for planning a knowledge sharing programme, writing a workplan and developing knowledge sharing events and workshops. The final appendix discusses the merits of collections review as a strategic approach to collections development and sharing collections knowledge. This can enable museums to make sense of their collections and in turn facilitate pragmatic decision making and knowledge sharing. Not surprisingly, several Monument Fellows have taken a collections review approach for their projects.

This Toolkit is really for anyone working in museums with an interest in capturing and sharing collections knowledge, skills development and ways of working more effectively. It can help museum directors and managers look with fresh eyes at the links between collections knowledge and organisational priorities. It offers collections specialists, museum generalists, learning staff, programme managers and project managers ideas for ways in which to share and capture collections knowledge in engaging and effective ways. It can help all museum staff make smarter links between their everyday work and developing their museum's collections. Underpinning all of this, the Toolkit encourages thinking about new ways of working together and adopting more inclusive approaches that will be beneficial to the organisation and its staff and audiences.

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1. Monument Fellowships from the Museums Association: opportunities to share and help develop collections knowledge

The Monument Fellowship programme was established in 2006 in response to the findings of the MA report *Collections for the Future*. The report found that many people were concerned that museums were doing too little to develop and share knowledge. The Monument Trust has a particular interest in helping museums to foster knowledge and scholarship, and generously agreed to fund a programme to enable retired museum professionals to share their knowledge with colleagues as Monument Fellows.

Between 2006 and 2011, 30 Fellows took part in the programme. The immediate aim of the programme was to enable these collections specialists to share unrecorded knowledge with former colleagues, their successors and the wider museum community. But the programme also aimed to encourage museums to think again about how knowledge is developed and shared. It aimed to raise the profile of collections knowledge, to emphasise its importance and to try out approaches to knowledge sharing that other museums might use and adapt.

The Monument Fellows worked in many different kinds of museums, from small independent museums to the biggest national museums, and with a wide range of different collections. They used many different approaches to sharing their knowledge, from the simplest one-to-one conversations, looking at an object in a store, to a highly organised programme of themed podcasts. This Toolkit aims to describe some of the most helpful approaches and suggest ways in which other museums might adapt them for their use.

There is more detail about how the Monument Fellowships worked in Appendix 1 on page 34 of this Toolkit. Some museums might want to consider running Fellowships on this model independently to help capture the knowledge of former members of staff, and section 3 on page 28 of the Toolkit has advice on how to do this. But many of the techniques and approaches used in the programme could be used to help people who work in museums share knowledge more effectively at any stage in their career. At the outset, the programme focused on how to help museums improve their succession planning.

From the experience of those involved, however, it soon became clear that the impact of the programme was not restricted to succession planning, but that it had the potential to help museums improve the way they share knowledge between colleagues, and the way that knowledge is shared and fostered in the wider museum community. The Fellowships also helped establish new working relationships across museum departments and introduce new ways of working more inclusively within the host museums.

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2. Some historical context: changing approaches to knowledge in museums

Collections specialists are thinly stretched and often have many demands on their time, limiting the amount of time they can spend making use of their specialist knowledge. The Monument Fellowships aimed to address a particular problem caused by the retirement of a generation of extremely knowledgeable curators who had extensive opportunity to build knowledge over a long career. The curators who are replacing them have developed their careers in a very different environment. They are much more likely to work on short-term contracts, often focused on particular projects, and so require a different approach to developing knowledge.

Fears that museums lack sufficient knowledge about their collections are nothing new. At the MA conference in 1897, Professor Flinders Petrie – a prominent Egyptologist – expressed concern that smaller museums lacked knowledge about some aspects of their collections, and put forward a proposal for a system of peripatetic curators to work with them. Over the 110 years since then, there have been several attempts to provide this kind of on-loan expertise, including – in a neat historical irony – a project by the Egyptology Subject Specialist Network focused on collections excavated by Flinders Petrie himself. Meanwhile, museum collections have grown in size and complexity, and the nature of the services museums provide has changed almost beyond recognition.

And while levels of investment in museums have fluctuated, there has never been enough money for everything museums want to do.

It seems clear that there was never a golden age of curatorial expertise. Nevertheless, there is a widespread perception that there are fewer specialist curators working in museums than there once were, and that those curators have fewer opportunities to build specialist knowledge than their predecessors did. Most of the collections specialists who worked as Monument Fellows began their museum careers in the 1960s and 1970s. This period saw a considerable investment in museums that, at the start of the 1960s, were still recovering from the impact of World War II. Many new museums opened in this period and the independent museum sector as we know it today came into being. More curatorial posts were created, along with a support infrastructure through the Area Museum Councils. A new sense of professionalism emerged. Many of the specialist groups that helped to galvanise curatorial disciplines were established during this period, offering training and networking opportunities to people building specialist expertise. University museum studies courses opened, starting with the course in Leicester in 1966, and the Museums Association Diploma – which had begun somewhat tentatively just before the war – really came into its own as a force for the development of expertise in museums.

There is a danger in this kind of account of indulging in false nostalgia. Museums in this period were, in many ways, less rich institutions than they are now, less concerned with the needs of diverse audiences and offering much more limited services to visitors. However, for all its limitations, this produced an environment in which it was easier to develop in-depth collections knowledge. Most of the Fellows had remained in one post for many years and, with a less project-focused culture in museums, had time to explore the collections and develop in-depth knowledge.

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From the early 1980s onwards, museums have been under pressure to provide a better service to the public, as well as to generate more of their own income. This has been a two-edged sword for collections knowledge. On the one hand, it has made curators much more focused on producing exhibitions and publications that people want to see and read. On the other, it has meant that people who work in museums are more focused on short-term outputs and that there is simply less time for developing collections knowledge.

Also in the 1980s, a new emphasis on standards in the care of collections emerged, culminating in the establishment of the Registration (later Accreditation) scheme in 1988. This has undoubtedly brought improvements to museums, but has had some negative consequences for collections knowledge. On the one hand, it has meant that museums have made considerable progress in improving their documentation, and now have a much better idea of what they hold in their collections. But inventories were sometimes hastily compiled to meet the requirements of the scheme and opportunities to generate and capture expertise were not always taken.

Some of the most positive changes in museums over recent decades have been in new approaches to telling stories and engaging with audiences. Successive movements in the sector have emphasised the way that museums in the past tended to overlook the experience or work of many different groups in society: women, people from ethnic minorities and people with disabilities, for example. Others have tried to encourage museums to look at different parts of the world, or to relate science and technology to people's lives. Museums have also thought much more carefully about how they communicate and about how they can make their exhibitions attractive and comprehensible. And some museums have begun to rethink their relationships with their audiences, so that they no longer see communication as a one-way street, from expert museum to passive public, but want to involve people outside the museum in shaping stories and determining what belongs in a museum's collection, or forms part of its displays. Museums today tell much richer, more complex stories and work differently with their communities. This has changed the traditional role of the 'expert'. Museums now expect their curators to be collaborators and facilitators, which has changed the nature of their work.

Museums still need knowledge, but they need different kinds of knowledge, and curators – and others working in museums – have to develop their knowledge in a different context. There will never be a return to a less pressured age. The challenge is to enable the next generation of museum collections specialists to develop relevant subject knowledge in this new context, with so many more demands on their time.

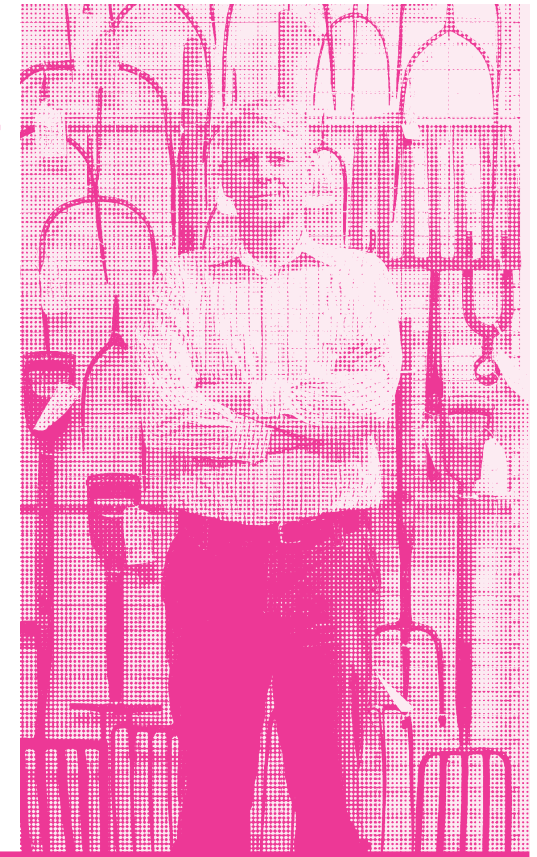
The knowledge that museum collections specialists develop today should be no less detailed and profound than the expertise of previous generations. But it will certainly look different.

"Subject knowledge is not something that's wrapped up and signed and sealed and finished,"

emphasises Gaby Porter, advisor to the Monument Fellowships. Future generations of curators will need to develop new kinds of knowledge for the new contexts in which they find themselves. The later rounds of the Monument Fellowships programme particularly emphasised this, encouraging Fellows to work with a wide range of successors and help them build skills that would enable them to develop their own expertise. Gaby adds:

"Knowledge sharing is not simply about 'downloading your mental hard drive', or the 'expert on the platform'. There has to be much more emphasis on empowering people to develop skills and knowledge."

This approach is at the heart of this Toolkit.



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Case study: Anthea Jarvis

Anthea Jarvis undertook her Monument Fellowship at the Gallery of Costume at Platt Hall in Manchester, part of Manchester City Galleries. Anthea had worked at the gallery from the mid-1960s until her retirement in 2006. She was a Monument Fellow there for 60 days between October 2007 and January 2009.

When Anthea retired, her colleague and fellow curator Miles Lambert was promoted to replace her. But he was replaced in turn, not by another curator, but by three part-time junior gallery assistants. This kind of restructuring was not uncommon among the museums participating in the Monument Fellowships. Many museum services take the opportunity to restructure their staffing when senior members of staff retire. The museum also appointed two photo archive assistants as part of a major project, funded by the Getty Foundation, to sort, catalogue, rehouse and scan an archive of 25,000 portrait photographs. Anthea worked with the new gallery assistants and the photo archive assistants. She trained the new gallery assistants in identifying, understanding and caring for historic dress, and mounting it for display. And she acted as advisor on the photo archive project, training the new staff in identifying and dating the photographs.

For the Gallery of Costume, having Anthea to work with the new assistants gave an immediate boost to their confidence and knowledge. Miles Lambert, who supervised the project, noted that this was “a unique opportunity, and one which I wish I could have had 25 years ago” Jennifer McKellar, one of the gallery assistants who worked with Anthea, said in her evaluation at the end of the project:

“I feel that after receiving training from Anthea I have increased in confidence in working with the collection and cataloguing the photographic archive. I also feel more confident in speaking to others about the collection.”

Miles says that the training Anthea was able to offer has helped ensure that all three gallery assistants have stayed with the museum. “It was great to be able to offer some proper training, especially now that training budgets are so low.”

Anthea’s approach to knowledge sharing combined hands-on work on the collections with preparation of detailed how-to manuals, which provide a long-lasting legacy from the project. To share her knowledge of the dress collection, she planned a series of small group sessions with the gallery assistants, investigating selected items illustrating a theme or period. Anthea discussed the objects with the gallery assistants, passing on her knowledge and inviting their comments and questions. She then prepared a series of notes and information sheets, based on suggestions from the gallery assistants about what they would find helpful. For her work with the photo archive staff, Anthea prepared a series of ‘crib sheets’ and using these, she worked with the documentation assistants to date and describe together a wide range of photographs. This combination of firsthand sharing of knowledge backed up by written reference notes seems to have worked really well.

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Anthea also led a very successful series of six masterclasses, two on each of three themes: Investigating Costume, Identifying Victorian Photographs and Mounting Costume for Display. Over 60 curators attended from across the UK. Some were junior costume specialists but most were social history curators or other non-specialists in charge of costume collections. Some were volunteers. Anthea says:

“The masterclasses have been particularly successful because there is such a demand now for practical, hands-on training in curating/interpreting costume and textiles, and few specialist costume curators left with the expertise to pass on. Most regional museums have a costume collection, but recent cuts in curatorial staffing levels mean that curators’ expertise has to be spread thinly over many disciplines. The enthusiastic response from the participants indicated that the information/knowledge I provided was really useful to them, and I was aware of their needs, having been in the same situation 40 years ago.”

Case study:
Anthea Jarvis
continued

The Harris Museum in Preston hosted the masterclasses as Platt Hall was closed for building works, and made use of the museum’s collection to give attendees practical, hands-on experience, especially in the session on mounting historic dress for display. The sessions used the information sheets Anthea had originally developed for the gallery assistants at Platt Hall. The attendees were very positive in their feedback, frequently noting that they now had “more confidence” when working with their own collections.

Finally, the MA offered Anthea an extension to her Fellowship so that she could revise her information sheets and make them suitable for a broader audience. They are now available online at <http://www.museumsassociation.org/collections/monument-resources> and are a permanent legacy from the project. Since then, Anthea has also been asked to deliver similar training to other organisations, drawing on the approaches she developed through her Fellowship.

For the participants, the Fellowship has also had a long-term impact. Anthea’s knowledge gave a boost to the gallery assistants at the start of their careers. Anthea noted that, for her personally, it helped her move into retirement as it offered an opportunity to leave a tangible legacy from her 40-year career in museums.

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Case Study: Jim Andrew

Jim Andrew undertook a Monument Fellowship at Thinktank in Birmingham. Thinktank opened in 2001 in a new building funded by the Millennium Commission. It replaced the former Birmingham Museum of Science and Industry. Jim had worked at the old museum as a curator, then keeper, since 1974 and took early retirement when Thinktank opened, but maintained links with the museum as a part-time collections advisor.

Jim worked on his Fellowship in 2008 and 2009. He worked mainly with Jack Kirby, collections interpretation manager, but also spent some time with the assistant curator and gallery enablers, developing their knowledge and understanding of the collections.

Jim and Jack developed a very systematic approach to transferring knowledge. They identified three distinct kinds of knowledge that they wanted to focus on through the Fellowship:

- Artefact knowledge about specific objects in the collection
- Subject knowledge: broader background information about the technologies represented in the collection
- Information management knowledge, such as insight into past documentation methods

Jim spent some time working directly with Jack on this knowledge transfer process and some time producing written records, both in the collections database and in a series of short papers. Jim and Jack scheduled some sessions to work together looking at objects both at Thinktank and at the Museum Collections Centre off-site. These sessions particularly helped Jack to develop his object-identification skills, improving his recognition of particular features and characteristics of the machines in the collection. This is the kind of essential curatorial skill that can only really be learnt by practical experience. Jack notes:

"I found the sessions directly examining artefacts in the museum galleries and in store at the Museum Collections Centre (both one-to-one and as part of the masterclasses) particularly useful. There is such a lack of object-based training in both the sector and related academic disciplines that the practical opportunity to develop skills in examining, recognising and identifying artefacts is very rare."

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In addition to these more formal and systematic sessions, they worked at desks near to each other, which gave them opportunities for frequent informal conversations about objects Jim was working on. Both Jim and Jack say that these little conversations were as important as the formal sessions, and especially useful for giving Jack opportunities to ask questions in areas where his knowledge was weaker, which meant that Jim could then offer further advice and sources of information. Even when working independently, producing written notes on various aspects of the collection, Jim made sure that he still consulted Jack and other colleagues regularly. "It's vital to check that what you're doing is useful," he says, "and that what you think is important is also important to the people who will be using the information."

Jim also spent some time helping Jack identify and understand useful information resources. Jack says: "Many curators have a filing cabinet of information collected by their predecessors that they never use. Jim's advice enabled me to make use of this untapped resource." They also planned a session to go through library material, so that Jim could offer advice about reliable sources of knowledge for key areas in the collection.

Jack emphasises the importance of working together on knowledge sharing. "The Fellowship was not purely one way: there were occasions when bringing together our different abilities resulted in something that neither of us could achieve alone." For example, they combined Jack's knowledge of an online patents database with Jim's knowledge of how to research and interpret historical patents. This enabled them to work together both to search for patents relevant to the collections and to train other curators at one of the project masterclasses.

Jim and Jack also spent time together looking at over 1,000 objects being considered for inclusion in a new gallery. This work helped Jack to produce a shortlist of objects to include in the gallery, with a better understanding of what these objects represent in historical and technological terms. Jack says that it was absolutely vital to the project's success to focus on an area of the collection that was important to the museum at the time, as it gave it urgency and impetus. "There were areas of the collection I would have liked to work on with Jim, but if I couldn't see the usefulness of them within a five-year horizon, I felt we had to put these to one side and concentrate on aspects of the collection we were going to make use of."

Jim delivered a series of training events, three internal events for the museum's gallery enablers and two for curators of social history, industry and technology from other museums. The external events were organised and publicised in conjunction with the Social History Curators Group and the Science, Technology and Industry Subject Specialist Network, which helped to bring in a large audience.

Jack says of the project:

"The Fellowship has given Thinktank a real opportunity to develop me and other staff, and build a long-term legacy of recorded information about the collections that can be used for both current and future projects."

Case study:
Jim Andrew
continued

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Sharing Knowledge: a Toolkit

The starting point for the Monument Fellowships was that people with a great deal of knowledge should have the opportunity to share it with others who are less knowledgeable. The opportunity to learn from an expert in this way is a fantastic way to improve confidence and skills and gain knowledge.

But these kinds of opportunities may be relatively rare. There is much that museums can do to make it easier for people to share knowledge through smaller projects and in their day-to-day work. This Toolkit sets out ideas for encouraging knowledge sharing in museums. The first section outlines some suggestions for creating an organisational culture and a working environment which encourages knowledge sharing. The second section looks at some simple techniques for sharing knowledge. The third section looks at the Monument Fellowship model and considers how it might be adapted to use by individual museums. All of these approaches depend on museums promoting effective ways of working together and supporting people's personal development. The final section looks in more detail at what this means for museums.

This Toolkit aims to give people ideas that they can implement in their own museum. However, the Monument Fellowships also sought to encourage knowledge sharing across the broader museum sector. Sector-wide initiatives are harder to implement and often need external funding. But some knowledge sharing approaches can be extended to the broader sector relatively simply. Whatever you do to encourage knowledge sharing within your organisation, think about whether you could invite colleagues from other museums to join in some elements of the work, or share learning through a specialist group, without making the project more onerous or expensive. Knowledge sharing is never a one-way process and when new people participate, they often ask new questions, bring new insights and spark new ideas for everyone involved.

SETTING THE SCENE



Most collections specialists in museums are, given the opportunity, very generous with their knowledge. After all, the reason collections specialists want to work in a museum is to make use of their knowledge and enthusiasm in a public context.

However, in practice, many collections specialists develop knowledge which they never share with colleagues or with the museum's users. Through the Monument Fellowships, the MA explored why this happens. For many people in many museums, the most significant barrier is time; in contemporary museums, collections specialists have to focus on projects and public outputs and often feel that developing and sharing collections knowledge is a luxury they cannot afford. But certain aspects of the organisational culture of museums can make knowledge sharing easier. Participants in the Monument Fellowships found these approaches helpful.

BUILDING AN ORGANISATIONAL CULTURE TO ENCOURAGE KNOWLEDGE SHARING

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1.1 Establish clear links between collections knowledge and public service

Investing in collections knowledge can sometimes seem to be at odds with contemporary museums' greater emphasis on access, openness and engagement. There is no rational basis for this. To serve the public effectively, museums need to build knowledge about the collections just as much as they need to protect those collections from damage. Building collections knowledge only becomes an indulgence or a luxury if that knowledge is not shared and not used to drive excellent public programmes. Museums need to make it clear that building and sharing knowledge is an essential part of the remit of anyone who works with collections.

In the past, collections specialists in museums often had the opportunity to pursue their own interests and develop knowledge for its own sake, even if it did not link to a clear public outcome. Of course, there can be benefits to this kind of 'blue sky' thinking. But we live in different times and museums have to work harder to demonstrate public benefits. That is not to say that museums should not undertake rigorous, original research. But they must ensure that it has a tangible public outcome, within a reasonable timescale. Justin Parkes, who worked on a Monument Fellowship as a successor at Summerlee, the Museum of Scottish Industrial Life, says that one of the benefits of the Fellowship was that it formalised the process of knowledge gathering and sharing.

"In the past, knowledge sharing was very informal, and collections knowledge was sometimes amassed without purpose. The Monument Fellowship ensured everyone knew why we were gathering collections knowledge."

Jack Kirby, who worked on a Monument Fellowship with a predecessor at Thinktank, says "whatever you work on has to be useful at the time". He suggests a five-year horizon for collections knowledge projects; if the knowledge is not going to support a public outcome within the next five years, time spent on it cannot be justified. That time horizon might be longer or shorter for you, depending on the nature of your museum. But set one, and ensure you stick to it.

Public outcomes need not be large scale. For example, Elizabeth Conran undertook a Monument Fellowship at The Bowes Museum and worked on the museum's collection of Old Master paintings. It was not part of her original workplan, but the museum realised that some of her work could form the basis of a public display. She planned a small display around a single painting, *Miracle of the Eucharist* by Sassetta, which offered a public way of sharing her in-depth knowledge.

Make sure there are mechanisms through which knowledge can find an audience. Museums have worked hard to make information they provide more accessible, in terms of the prior knowledge they assume and the way information is written. Today's museum professionals are trained to write short, easily digestible gallery text that is accessible to non-specialists. However, visitors sometimes complain that this leaves questions unanswered and some visitors would like access to deeper, less superficial information. Visitors come with different amounts of prior knowledge. Make sure there are ways to access more technical or specialist information for people who want it.

BUILDING AN ORGANISATIONAL CULTURE TO ENCOURAGE KNOWLEDGE SHARING

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The Museum of English Rural Life used Jonathan Brown's Monument Fellowship there as an opportunity to explore ways of offering visitors better access to significant levels of expertise. Museum director Kate Arnold-Forster says:

"I've always been aware of the difficulties, especially for smaller, less well-resourced museums, of sharing effectively the depth of expertise and knowledge they may hold on their collections. Simple and often superficial levels of information are easy to disseminate, but knowing the best way to help the public benefit from our depth of collections knowledge and develop and extend their own expertise is another matter. In our case, finding an appropriate format to engage the interest and enthusiasm of specialist interest groups was the key.

"What we have seen since the Fellowship workshop programme is a step change in the levels of engagement and participation by the public in helping us to provide greater access to and information about our agricultural engineering collections. For example, a regular group of volunteers now spends time at the museum each week helping us document our collection and, at the same time, helping us to capture their 'firsthand' knowledge and expertise as part of this process."

The Museum of English Rural Life also continues to run a series of masterclasses as part of its public programme, based on the approach to sharing knowledge developed during the Monument Fellowship there. They have become some of the most successful events at the museum.

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1.2

Involve as many people as possible

Developing and sharing collections knowledge should not be the sole preserve of curators and other collections specialists. Museums have to think about their long-term sustainability as organisations. A business model in which a vital resource, in this case, knowledge, is invested in a single individual or a small group of specialists is clearly not the most sustainable in the long term. The more people who know about something, or know how to do something, the more likely that knowledge is to survive and be useful.

For example, Christine Longworth, Monument Fellow at Norton Priory Museum and Gardens worked with staff in many different roles, as well as volunteers. She was highly imaginative in thinking about the kinds of knowledge that would help people make better use of collections and, for instance, produced a fact sheet that the gardeners now use to identify fragments of tiles they might dig up while gardening.

Anthea Jarvis, Monument Fellow at the Gallery of Costume in Manchester, advocates involving volunteers in knowledge sharing whenever you can. On the simplest level, she suggests, increasing the numbers attending makes such events more worthwhile. But more than that, volunteers can ask different questions and bring different perspectives, and this is very helpful.

Sharing knowledge widely does not mean that everyone will end up with the same knowledge or skills. Ken Teague, who undertook a Monument Fellowship at the Horniman Museum and Gardens, worked with people in a range of different roles.

He advises: "Think about knowledge – for what and for whom?" That is, how will someone use their knowledge? Which audiences will they be serving and in what context? A gallery assistant who is working with the public on a day-to-day basis needs to know the answers to the questions visitors mostly commonly ask, as well as how to talk about an object in a way that could capture someone's attention or spark a conversation – and that might be about asking questions, as well as sharing facts. A fundraiser, on the other hand, needs to be able to talk about the collection in a way that will capture the imagination of would-be funders and so is more likely to need to know about its significance and comparative importance – and less about how things work, or how they were made.

In his Fellowship, Ken found that the best way to achieve this was to look at the objects on a one-to-one basis with a range of colleagues and use the objects as a starting point for a conversation, rather than starting the session with a predetermined set of ideas and information he was intending to share.

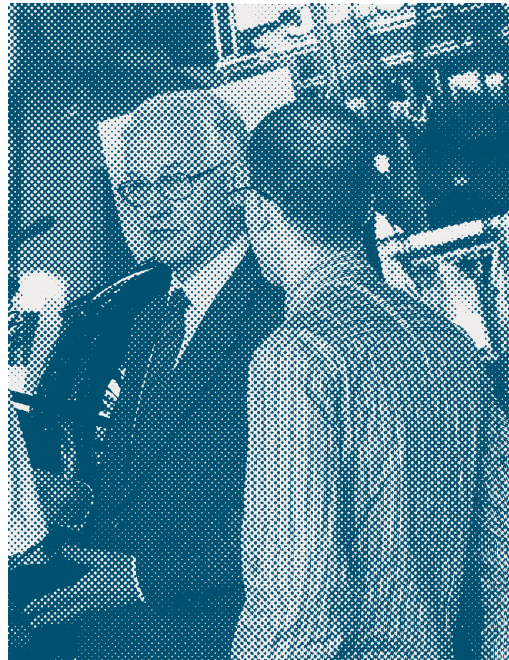
At Thinktank, gallery enablers are encouraged to pursue their own research into the collection in order to build up simple fact sheets about key objects. The museum finds that this enables them to tailor the information to their audiences more effectively than if they were given a crib sheet by a curator. It also starts to ensure that more people participate in the process of developing and sharing knowledge. The enablers can work towards gaining an 'expertise badge' in recognition of the knowledge they have built up, which enables them to progress to a more responsible role.

BUILDING AN ORGANISATIONAL CULTURE TO ENCOURAGE KNOWLEDGE SHARING

1.3 Remember that knowledge needs to change and grow

Collections knowledge is not a static entity. Research is the engine that drives knowledge, and new research is always required to answer new questions about old collections, as well as to guide and inform new collecting. Museums should encourage all members of staff who work with collections to pursue research. In practice, the time for this might be severely limited but museums can sometimes find opportunities by changing the way they work. For example, one museum participating in another MA programme, Smarter Museums (<http://www.museumsassociation.org/download?id=298384>), took the decision to bring in fewer temporary exhibitions from outside and to develop more using internal resources and the museum's permanent collections. This gave members of staff – including one member of front of house staff – the opportunity to undertake some research and develop knowledge of the collections.

Encourage research on the collections by external researchers, whether professional researchers, students or family historians. Miles Lambert, who worked as a successor on the Monument Fellowship at the Gallery of Costume in Manchester, notes: "Curators today are much more the compilers and facilitators of others' research, with less opportunity to pursue research of their own." If this is true for you, make sure that you get copies of any resulting papers or publications.



1.4 Encourage a culture in which no one is embarrassed to admit to gaps in their knowledge

Junior collections specialists sometimes say that they can be inhibited from asking questions about the collection by anxiety that the questions seem foolish. But admitting what you don't know is an essential first step towards building any kind of knowledge. Make sure everyone who works in your museum knows that they can admit to gaps in their knowledge. Jack Kirby, who worked on a Monument Fellowship at Thinktank, says that the process of sharing knowledge with the museum's Monument Fellow occasionally exposed areas where his own knowledge was weaker, but that this offered a helpful opportunity to concentrate on those areas and fill the gap. And if people who work in museums are prepared to say when they don't know something, it will help set the tone for more open and accessible communication with visitors.

1.5 Plan ahead

The most knowledgeable members of staff in any museum are often the longest serving, and it is easy to take their presence for granted and to assume they will be there for ever – or at least until a safely-distant retirement date. But this attitude can lead to complacency. Often museums pay too little attention to ensuring that the knowledge of expert members of staff is shared and accessible. People's circumstances change. However unlikely it seems, apply the Lottery winner principle. Ask yourself what would happen if your most expert member of staff decided to resign and imagine how you would manage without their knowledge. While none of the Monument Fellows won the Lottery, many of them did retire early and without any clear succession planning. One lesson of the Monument Fellowships has been that retirement is not always orderly and predictable. Some of the Monument Fellows took early retirement in difficult circumstances, sometimes with only a few days to decide whether to retire and then a few weeks to tie up the loose ends of a long career.

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One of the original aims of the Monument Fellowships was to encourage more succession planning in the sector. Several museums which took part in the Monument Fellowships went on to think about how they could plan for the retirement of other key staff and one or two adapted the Fellowship model to use for other retiring members of staff. However, it became apparent through the course of the programme that the 'apprenticeship' model of a long-standing expert working alongside a single direct successor was too simplistic. Very few Fellows had a direct successor, in the sense of someone doing exactly the same job, and the most successful Fellows shared their knowledge with a range of staff. This offers helpful pointers for effective succession planning. It should not be a one-off download of someone's expertise, from one individual near retirement to their successor, but an ongoing process of knowledge sharing and collaboration with a wide range of colleagues throughout a career. Klaus Staubermann, who worked with a Monument Fellow at National Museums Scotland, says that when thinking about sharing knowledge, museums should aim for sustainability and think long-term.

"It is easy to organise a one-off dissemination event but keep in mind there are generations of curators to come who require collections and artefact knowledge."

In many museums, it is no longer the norm for people to stay in the same post for many years, as the Monument Fellows did. More and more people who work in museums work on short-term contracts or make frequent moves to develop their career. In this context, museums need different approaches to sharing and developing knowledge. "Knowledge is becoming more bite-sized," says Catherine Price, human resources manager at Thinktank. When people stayed in jobs for a long time, it was possible to pick up knowledge gradually and informally. Now that people move more often, museums need more focused and systematic approaches to gathering and sharing knowledge. Catherine says that Thinktank tries to find low-cost ways to nurture younger staff and give them opportunities to take on more responsibility. "We work hard at growing our own experts."

1.6 Make sure that the systems used to share knowledge are accessible to everyone

The Fellows in the Monument Fellowship programme were retiring at the end of over 20 years of intensive investment in documentation in the museum sector, especially driven by the requirements of Accreditation (previously Registration). However, in many cases, Fellows had their own personal records which they had never been able to merge with the 'official' collections management systems. This was partly down to pressures of time. But it was also perhaps attributable to the way that computerised documentation systems were developed in museums. Many museums established new processes for computerising their collections inventories, often using temporary staff who were not integrated into mainstream curatorial work. A lot of people thought of themselves as not technically-minded and thought that computerised documentation was a highly technical process to which they could not contribute.

Museums are perhaps only now properly overcoming this cultural barrier. There are two lessons from this experience for contemporary museums. Firstly, all information resources should be shared and easily accessible. Secondly, as new technologies emerge, everyone who works with knowledge and information should get up to speed with them. As museums begin to experiment with social media, and new approaches like podcasting, it is essential that these are not again allowed to become the preserve of the technically-minded.

Gwendolen Whittaker, who worked with a Monument Fellow at York Museums Trust on a project that involved video recording and podcasting, says:

"It's absolutely essential to embrace new technologies and get our skills up to speed if we're going to keep up with the demand in society for knowledge. People in museums can see the exciting potential of new technology, but there is a skills gap."

She suggests that it's essential that all curators are given time to develop basic new media skills, and time to put them into practice.

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Sharing knowledge: four golden rules

Whatever approaches to sharing information you use, apply these rules:

Rule 1: Think about how people learn

Museums have become much better at understanding how people learn when they are working with their audiences. Apply these insights to internal training and knowledge sharing too. Not everyone learns in the same way. If this is not something you have thought about before, you may find it helpful for you and your colleagues to complete a learning styles questionnaire. There are several free examples available online, including on the Inspiring Learning for All website (<http://bit.ly/iyyys0>). When planning learning, think about including a mix of practical activities and self-directed research alongside formal teaching. You don't need to adhere to the results of a learning styles questionnaire slavishly. In practice, most people respond best to a mix of different activities, and variety is key.

Rule 2: Share skills as well as sharing information

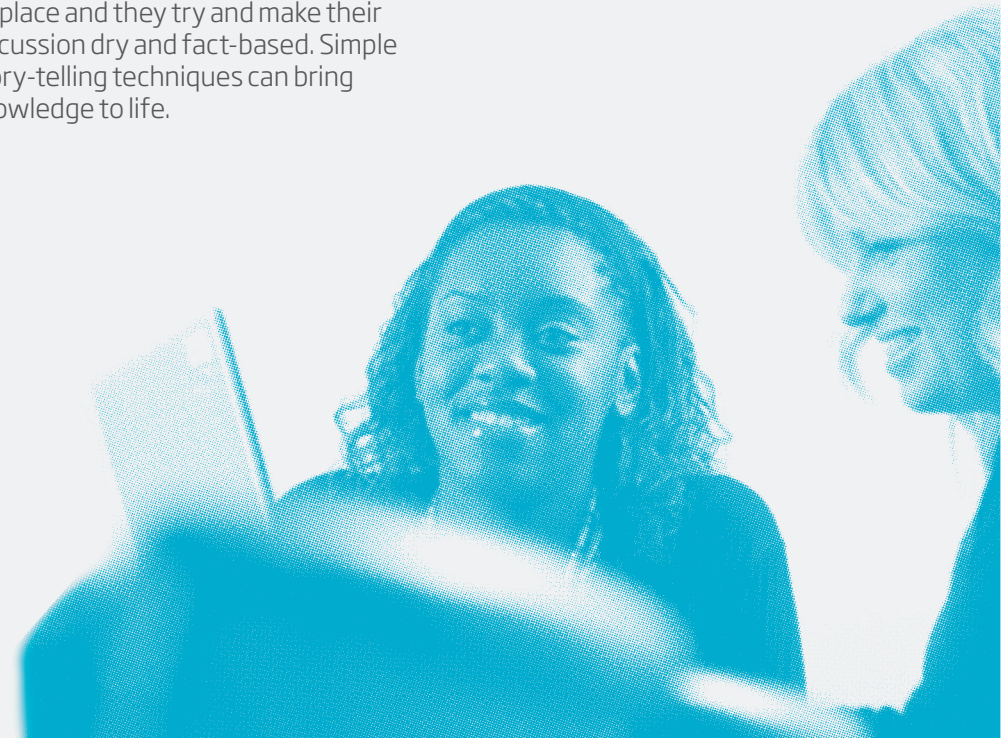
The Monument Fellowships started with the idea of getting an expert to share things they knew about a collection with people who were less knowledgeable. But it is more sustainable to help people develop their own knowledge for the future, and to know how to find answers to their questions when the expert is no longer available. The aim should be to enable people to develop further knowledge and expertise, not to continue to rely on an expert. For example, don't just tell colleagues that a certain object is made out of zinc. Explain to them how you know that, for example by looking at certain characteristics of the object, and by understanding which industrial processes tended to use which metals.

Rule 3: Build in evaluation, and make sure what you're offering is really fulfilling a need

Experts sometimes think that the importance of what they know is self-evident. But different people need different kinds of knowledge for different purposes. Jim Andrew, Monument Fellow at Thinktank says: "It's vital to check that what you think is most important matters most to others."

Rule 4: Tell stories

Make sure people involved in knowledge sharing projects feel free to tell stories about objects in the collection, the people associated with them and the history of the museum. People respond to stories: they pay attention and they remember them. But too often, people working in a formal environment feel that narrative has no place and they try and make their discussion dry and fact-based. Simple story-telling techniques can bring knowledge to life.



BUILDING AN ORGANISATIONAL CULTURE TO ENCOURAGE KNOWLEDGE SHARING

Checklist

- Make time to look at objects together
- Spend time with the objects
- Lead conversations, don't deliver a lecture
- Be selective
- Capture information about specific objects
- Produce notes to back up your discussion
- Pool knowledge for a specific project
- Use sound and film recordings to capture collections knowledge
- Produce fact sheets and study guides
- Produce manuals that explain complex curatorial tasks
- Share knowledge that explains the museum's history and that will unlock unused resources
- Build in opportunities for informal learning
- Involve the wider museum community where possible



"It's only when you spend time looking at a large quantity of ostensibly similar objects that you start to be able to spot differences and begin to understand which of them are more important and why. And you need to take time over this. It's only when you look at objects repeatedly that information gets absorbed."

Jack Kirby, Monument Fellowship successor, Thinktank

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2.1

Make time to look at objects together

The simplest approach to sharing collections knowledge is for two people, or a small group, to look at a selection of objects from the collection together. If done well, this simple approach can also be extremely effective. Almost all the Monument Fellows worked in this way, and this is some of the advice they and their colleagues have to offer:

- Jack Kirby, who worked as a successor on a Monument Fellowship at Thinktank, spent a lot of time going through objects in store on a one-to-one basis with the Fellow, Jim Andrew. "Time spent with the objects is crucial," he says.
- Don't start with a list of facts to impart. Have an open-ended conversation.

"Discussion over objects is helpful because it prompts further memories,"

says Dan Mackay, Monument Fellow at Summerlee, the Museum of Scottish Industrial Life. Dialogue is also more engaging and memorable than a monologue. Mary Brooks, Monument Fellow at York Museums Trust, made a series of films during her Fellowship that focused on people talking about objects. She based her approach on "making conversations happen", and prepared groups of objects for colleagues to look at in advance, started off a conversation with them, and then gradually withdrew as the conversation progressed so that they could explore the objects together.

- Be selective: choose a group of objects linked to one of the museum's projects or priorities. For example, Len Pole, Monument Fellow at Saffron Walden Museum, and Susan Collier, the documentation and exhibitions officer, shared knowledge by looking together at objects being considered for inclusion in an exhibition, to give their discussions greater focus. Mary Brooks spent a long time before each of her sessions choosing a group of objects to fit a particular theme.

- Make sure you capture the information from each session effectively and promptly. Some participants in the Monument Fellowship programme recorded their discussions, and there is more on this in section 2.3 overleaf. Others have added the information straight to the collections database. For example, Jim Wood worked on a Monument Fellowship on the technology collections at National Museums Scotland. Klaus Staubermann, who supervised the Fellowship, says that they had originally intended Jim to work on a one-to-one basis with a single curator, but then realised it would be more effective for him to work with a group. Each morning during the Fellowship, Jim got on a bus out to the collections store with a team of two or three members of the department. The team would come back to the museum mid-afternoon, talk through what had been achieved that day with other colleagues and process the information straight onto the collections database. Klaus says this was very important. "Previously, knowledge would get lost, for example, when collections were moved, and the museum often had a documentation backlog. So the discipline of recording information and adding it to the collections database immediately was important."

- Anthea Jarvis, Monument Fellow at the Gallery of Costume in Manchester, also worked extensively in this way. She selected a group of objects to explore and discussed them with the gallery assistants she was working with. After the session, she prepared written resources about the objects for her colleagues' future reference. For Anthea, it was important to work in this order, and only prepare the written resources after the discussion, so that she could be sure that the written information resources reflected what colleagues would find valuable.

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2.2

Work together on a specific project

A number of the Monument Fellows worked with colleagues on projects such as new galleries or temporary exhibitions as part of their Fellowship. Len Pole, Monument Fellow at Saffron Walden Museum, worked with one of his successors, Susan Collier, to plan an exhibition. Len and Susan used the process of preparing the exhibition as an opportunity to share knowledge and skills by working separately, then sitting down together and reflecting on their practice. They both made separate selections of objects to include in the display. They then compared notes and agreed a final list. Susan wrote text for the exhibition, and then Len reviewed it with her and made comments. Finally, they worked together on the exhibition installation and layout. This approach to joint working, with its built-in elements of reflection and support, is a good way of sharing and developing knowledge with the added impetus that comes from working on a 'live' project.

2.3

Use sound and film recordings to capture collections knowledge

A number of Monument Fellows were recorded talking about objects in the collection. This can help capture more informal, intangible knowledge, such as the stories or anecdotes associated with an object. It can encourage people involved in knowledge sharing projects to talk more expansively, rather than editing down their knowledge to what they think belongs in a written record. It can give you a valuable resource for sharing collections knowledge with visitors, on websites or in galleries. And it can be useful for complex or working objects, making it easier for people who know them well to share knowledge about different components or working processes that might be harder to capture simply and clearly in a written record; you can convey a lot of information simply by pointing.

Mary Brooks undertook a Fellowship at York Museums Trust and her whole Fellowship was based on this approach. Mary and her colleagues identified a number of themes, some broad and some more specific ('Collection gems' or 'War-time fabrics and fashion', for example) and made a film on each of these.

She identified groups of objects to use for each film and then worked with colleagues to film carefully planned discussions about the objects. Mary's approach placed great emphasis on close study of the object. For example, in one film about utility clothing, a garment they examined had characteristics, such as tucks and shoulder pads, which the literature suggests are not found in utility clothing. Film lends itself well to this kind of detailed, object-led study.

Gwendolen Whittaker, who worked with Mary, says that filming is also a great way of capturing the "spontaneous little nugget" of information that more traditional approaches to recording might miss. "There's only so much that you can write down in your notebook, only so many fields in a collections database." Film is also good for capturing a personal approach to an object.

"There might be omissions when you film a conversation, but for us this was more than compensated for by the gems we did record."

Whereas Mary's Fellowship had always been planned around films, for Dan Mackay, the Monument Fellow at Summerlee, the Museum of Scottish Industrial Life, using film came about more organically as the project progressed.

Once the project was underway, the colleagues with whom he was working decided to experiment with recording Dan and, when it worked well, made extensive use of this approach. Justin Parkes, collections manager at Summerlee, says: "One major advantage of audio recording in particular is that it allows for flow, much more so than producing written records." The staff also found video recordings very helpful for describing machine tools and explaining how they would have been operated. Justin and his colleagues aim to produce long and short versions of Dan's films: the long versions for internal documentation, and the shorter versions for use in galleries.

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Some tips for using film and audio recording:

- You don't need expensive equipment. York Museums Trust used an ordinary, digital camcorder and Gwendolen Whittaker suggests that it can be an advantage to use technology that's familiar and simple, as people are less intimidated by it. Mary Brooks, the Fellow at the trust, had no previous experience of working with a video camera
- Mary Brooks is a trained conservator and had received training in how to light objects for photography. She says this improved the quality of the resulting films and recommends the use of floodlights if possible
- Editing is part of the knowledge sharing process and you may find it helpful to involve the expert you've recorded in the editing, to ensure you capture the important information. Basic editing software usually comes with a camcorder and is good enough to produce a slightly rough-round-the-edges, YouTube-style finished product, if you don't have access to a proper editing suite
- Whatever you record, make sure it is linked to your collections database and easily accessible

- Recording a conversation can offer a more interesting and watchable experience than a monologue, particularly if you're planning to use your recording for the public
- Use a variety of locations to add interest
- If some colleagues are self-conscious about being filmed and awkward on camera, see if they are happier if you just film their hands and record their voices.

2.4 Produce fact sheets and study guides

A number of Monument Fellows produced study guides that offered an overview of a particular part of their museum's collection. For example, Jonathan Brown, the Monument Fellow at the Museum of English Rural Life, produced a series of guides to the collection, fact sheets and glossaries. Kate Arnold-Forster, who supervised the Fellowship, says, "We use these all the time to help staff and members of the public."

For study guides to be useful in the longer term, they need to be written from the point of view of the user, not the expert, in terms of the way they approach the subject. For example, ask colleagues what sort of enquiries from the public they find difficult to answer. Are there curatorial tasks that they find challenging, where a step-by-step guide would be helpful? Anthea Jarvis, Monument Fellow at the Gallery of Costume, found it was vital to talk to people about what sorts of information they would find helpful before producing her study guides. Some other Fellows, who were less confident communicators, produced less structured notes that colleagues then 'repurposed' into fact sheets and study guides, which is an alternative, though more time-consuming, approach.

Mary Brooks, Monument Fellow at York Museums Trust, made a series of films about the collection as the focus of her Fellowship. But she also produced a resource pack to accompany each film, with information about the objects featured and background reading. For Mary, this was a crucial way of making the knowledge sharing she had undertaken sustainable.

2.5 Produce manuals that explain complex curatorial tasks

Anthea Jarvis, Monument Fellow at the Gallery of Costume, produced a manual (<http://www.museumsassociation.org/download?id=56644>) that explains how to mount dress for display. It offers a practical step-by-step guide and is illustrated by photographs showing different stages of the process. It grew out of a workshop that Anthea delivered as part of her Fellowship and offers the kind of information that people attending the workshop said they felt that they needed. This kind of how-to guide can be very reassuring and give non-specialists the confidence to attempt tasks they might otherwise shy away from.

KNOWLEDGE SHARING APPROACHES TO TRY OUT

2.6 Share knowledge that explains the museum's history and that will unlock unused resources

Many museums have under-used information resources produced by previous curators: files that seem impenetrable, notebooks that no one ever looks at. There is no point keeping these resources unless you are going to start making use of them. Jim Andrew, the Monument Fellow at Thinktank, spent time explaining the significance of some of these kinds of information resources to colleagues. Jack Kirby, his successor, says,

"I know a lot of curators who have a filing cabinet of information they never open, or old albums of photographs no one knows anything about. Thanks to Jim's explanations of previous curators' systems, we can now use some of our information resources again."

Labels from previous exhibitions are often not systematically recorded, but can be a useful source of information. Ken Teague, Monument Fellow at the Horniman Museum and Gardens, has recorded information from exhibition labels as part of his Fellowship.

Many museums do not have a written account of their organisational history. This may not have been perceived as important when museum staff often stayed in post for 20 years or more. But now staff turnover is much higher, it is easy for museums to be left without proper knowledge of key events in their own history. It can be really useful to have an account of staff changes, changes to galleries and stores, major exhibitions or acquisitions, and different approaches to documentation, for example. Elizabeth Conran, Monument Fellow at The Bowes Museum, wrote an account of the museum's history and worked with a temporary archivist to make sense of the museum's own records, which will be a vital resource for future staff as well as people researching the history of museums more broadly.

2.7 Build in opportunities for informal learning

Remember that some of the most helpful insights come from serendipitous conversations that could never have been planned, waiting in the kitchen for the kettle to boil, or passing by a colleague's desk. Many of the Monument Fellows tried to maximise the opportunity for informal knowledge sharing, for example by making sure that they sat near colleagues they were working with, rather than in a distant store or study room. People are more likely to ask for simple bits of advice or insight if they are sitting near someone and don't need to make a special effort. Think about how your offices are laid out, and whether rearranging the workspace could encourage more informal knowledge sharing, or whether you could encourage people to eat lunch together perhaps once a week and chat about projects they are working on. Jonathan Brown, the Monument Fellow at the Museum of English Rural Life, followed a carefully planned programme of knowledge sharing but found that some of the most helpful conversations were spontaneous, with one colleague saying, "I got more from that chat than a training session."

Think about opportunities for people to absorb small pieces of information as they go about routine tasks. At Summerlee, the Museum of Scottish Industrial Life, members of staff have been thinking again about how they share knowledge as a result of the Monument Fellowship. One of the things they have done is to label objects in store with short information labels, not just numbers. This keeps information with the object and means that people are much more likely to find out at least a little about unfamiliar objects if they come across them while working in store.

KNOWLEDGE SHARING APPROACHES TO TRY OUT



2.8

Involve the wider museum community where possible

Whenever you are planning any kind of systematic knowledge sharing, or a training event, think about whether you can make it open to the wider museum community. All Monument Fellows had to undertake to share their knowledge with colleagues beyond their museum. They did this in many different ways, from formal seminars or masterclasses, to more informal sessions where people pooled their knowledge. Gaby Porter helped the Fellows plan their events, and there is advice from her in Appendix 3 on page 39. You may not have the resources to plan a formal knowledge sharing event, but think about whether you could perhaps sometimes invite just one or two colleagues from other museums to more informal events.

Some of the Monument Fellows shared their work with colleagues through Subject Specialist Networks or specialist groups. For example, Jim Andrew at Thinktank organised training days which were publicised through the Social History Curators Group and proved very popular. Jim Wood at National Museums Scotland shared his work on the collections through STICK, the Scottish Technology and Industrial Collections Subject Specialist Network. Klaus Staubermann, who worked with Jim at National Museums Scotland, says that the advantage of this approach is that,

“If one individual leaves, knowledge is not lost to the community.”

For more on STICK, see Appendix 4 on Collections Review, page 41

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Some museums may have the capacity to run a programme on the model of the Monument Fellowships, bringing in an external expert, perhaps after their retirement, to work on a knowledge sharing project.

National Museums Scotland, for example, found the work of their Monument Fellow, Jim Wood, so useful that they created a similar, though smaller, Fellowship for another retiring collections specialist.

The Monument Fellowships programme was a funded scheme and most of the Monument Fellows were paid a small daily rate. However, several of the Fellows commented that the payment was less important in making the project work than the clarity of status and purpose that the Fellowship gave them. Being able to refer to themselves as Monument Fellows raised the profile of their projects internally and externally and underlined the seriousness and importance of their work.

Your museum may be able to harness some of these benefits by offering the status of Visiting Fellow to people who have the capacity – and willingness – to help your museum by sharing their knowledge in a time-limited programme, even without the resources to pay them a daily rate.

There is more detail about how the Monument Fellowship programme worked in Appendix 1 on page 34, but this outline aims to offer guidance to museums considering a knowledge sharing Fellowship.

THE MONUMENT FELLOWSHIP MODEL: RUNNING YOUR OWN KNOWLEDGE SHARING FELLOWSHIP

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3.1 Identify the need

The most successful Monument Fellowships started with clearly defined needs. These included:

- New members of staff joining the organisation who lacked relevant subject knowledge
- Major projects which necessitated a reappraisal of knowledge, or offered the opportunity to make use of an underused part of the collection
- A lack of in-house expertise on a particular aspect of the museum's collections.

A clearly defined need will give your project impetus and urgency and help ensure that colleagues take it seriously and give it appropriate priority.

3.2 Identify the potential Fellow/Fellows

Potential Fellows may include former employees of the museum, especially retired collections specialists. However, think about other people who might be prepared to work with you in this way, including volunteers and retired collections specialists from other museums. Remember that conservators have very considerable collections knowledge, and often bring a different way of looking at objects to bear. A few of the Monument Fellows were conservators, and colleagues found their insight valuable, especially where they no longer had in-house conservation expertise.

Consider working with more than one person. Some museums that took part in the Monument Fellowships are actively considering finding other people to work with in this way. No one person, however knowledgeable, can ever give you complete insight into your collections – all knowledge is partial and has a personal slant.

3.3 Set the ground rules

However well you know the prospective Fellow, you should make sure that you have a proper conversation to clarify the expectations on both sides and make sure that both the Fellow and colleagues in the museum are absolutely clear about the terms of your working relationship. It is helpful to commit this to paper in a simple Fellowship Agreement, which could be in the form of a letter or email if that feels more appropriate. The agreement should include:

- What areas of the collection the Fellow is going to work on
- With whom the Fellow is going to share their knowledge. Ensure that everyone you would like to work with the Fellow is in agreement and has set the time aside
- Who is going to manage the Fellowship. All Fellows should have an identified supervisor, who may or may not be involved in the knowledge sharing process
- How long the Fellowship will last. (Monument Fellowships lasted for between 50 and 100 days, spread out over up to a year.) Agree what the pattern of work will be; for example, is the Fellow going to work for a day each week, or perhaps for longer blocks of time, such as one week in every four?

- What you are going to do to support the Fellowship. Whether you can offer any payment or expenses, and what other resources will be available (desk space, computer access, etc.)
- What is outside the scope of the Fellowship. Especially where the Fellow is a former employee, you have to be aware of sensitivities on both sides and make sure that everyone is clear about the scope and limits of the Fellow's work. However, remember that slightly awkward relationships can always be improved. Some of the museums that took part in the Monument Fellowship programme said that one benefit of the Fellowship was that it offered the opportunity to renegotiate and re-establish the terms of their relationship with a former colleague that might have been slightly awkward or strained (especially where the Fellow was a former director, or left in difficult circumstances).

THE MONUMENT FELLOWSHIP MODEL: RUNNING YOUR OWN KNOWLEDGE SHARING FELLOWSHIP

3.4 Establish a workplan

Make sure you draw up a workplan outlining the Fellowship. Further guidance and a possible model for the workplan are provided in Appendix 2 on page 35. This is based on the workplan that the Monument Fellows used, and may be more detailed than you need, but could prove a useful starting point.

Section 2 of the Toolkit is full of ideas for what the Fellow might actually do on a day-to-day basis to share knowledge. Some key pointers to consider when drawing up the workplan:

- Encourage the Fellow to share skills as well as facts
- Fellowships work best when Fellows and colleagues have time to work together looking at objects, or on a project. Make sure more than half of the Fellow's time is spent working directly with colleagues
- Plan a range of different activities and make sure that the Fellow has some work they can undertake independently when colleagues aren't available

- Think about whether you can find ways to share the Fellow's knowledge with the wider museum community, perhaps by inviting colleagues from other museums to attend some sessions. If this is not practical, at least ensure that the Fellow works with as wide a range of people as possible within your museum, including volunteers if appropriate
- Make sure that any records generated by the Fellowship – whether written records, or audio recordings, etc – are in a format that will remain accessible for the longer term, preferably linked to your collections database.

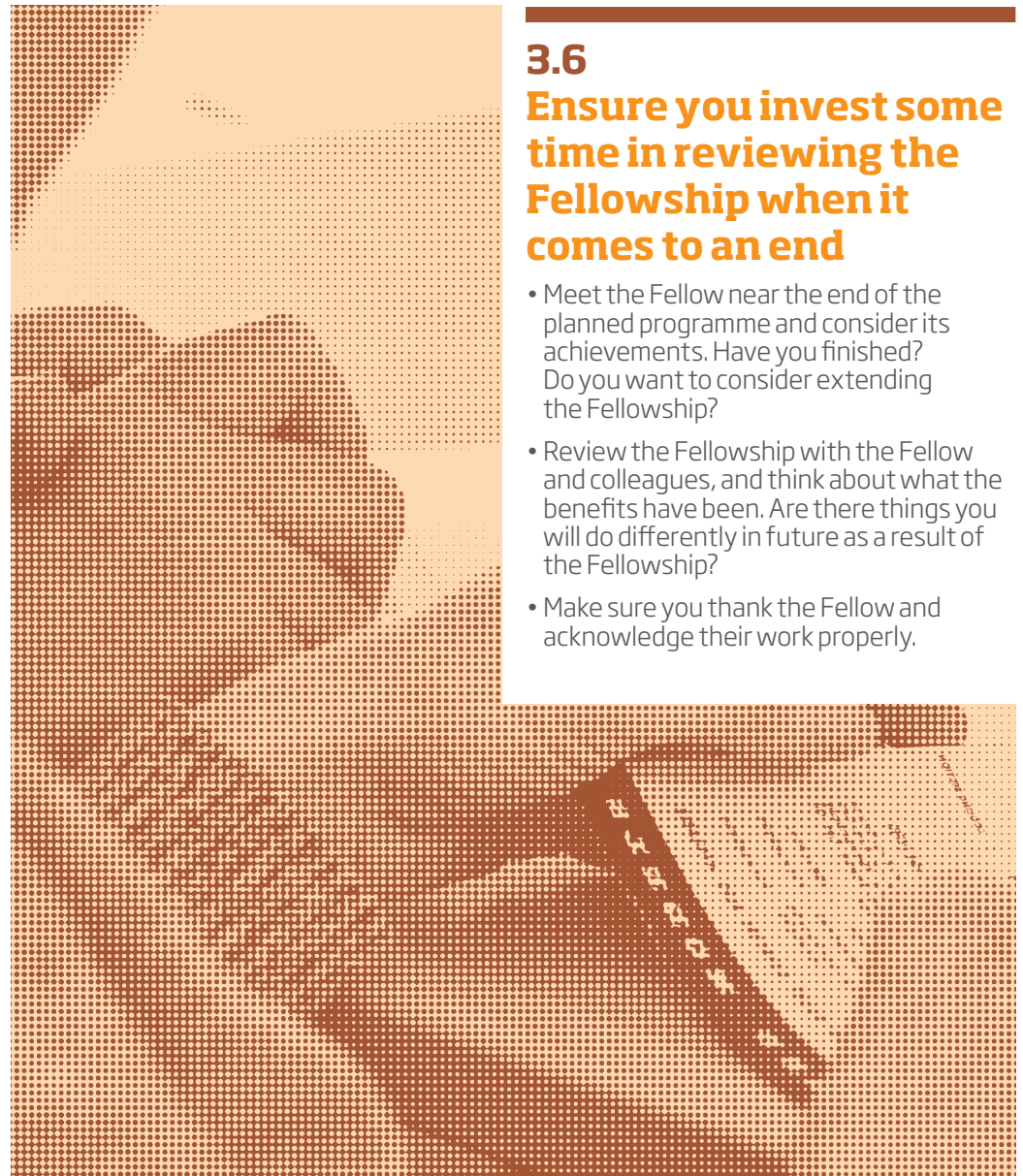
3.5 Build in opportunity for review

Make sure the supervisor and Fellow sit down and review progress at regular intervals. A first meeting about ten working days into the project will help you check you've got the basics right (or sooner for short Fellowships). A fuller review about halfway through will enable you to check progress against the workplan and amend the plans if necessary.

3.6 Ensure you invest some time in reviewing the Fellowship when it comes to an end

- Meet the Fellow near the end of the planned programme and consider its achievements. Have you finished? Do you want to consider extending the Fellowship?
- Review the Fellowship with the Fellow and colleagues, and think about what the benefits have been. Are there things you will do differently in future as a result of the Fellowship?
- Make sure you thank the Fellow and acknowledge their work properly.

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Effective knowledge sharing within an organisation depends on building good working relationships between people and encouraging and developing the people taking part as individuals.

This includes:

- Creating the right environment for learning and development: knowledge sharing, like all kinds of development, happens most effectively in learning organisations with strong leadership
- Making knowledge core: embed the requirement to develop and share collections knowledge into museum policies and procedures
- Planning for success: planned and structured continuing professional development (CPD) can focus and capture knowledge being developed and improve the way it is shared
- Empowering staff: staff will be more motivated if you promote inclusive working practices, give them a sense of ownership and make it clear that you value the work they are doing
- Choosing the right approach: in the current economic climate, low cost work-based and informal learning are likely to be the most achievable and effective approaches
- Sharing it widely: the power of networking. Whether within an individual organisation or the wider sector, networking is essential to sharing learning and knowledge.

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4.1 Creating the right environment for learning and development

In order to create an environment which encourages knowledge sharing, there needs to be an organisational culture that supports learning and staff development. Mary Brooks, Monument Fellow at York Museums Trust, says that for people to develop their knowledge effectively they need to feel:

“Secure, confident and enabled.”

This is obviously difficult in the current economic climate, when people feel anxious about the future. A clear organisational commitment to learning and development can help give people some confidence and optimism about the future. This has to be embedded throughout the organisation, but it has to start from the top. Leadership from senior staff is essential. They need to recognise the importance and value of specialist knowledge and be able to communicate and prioritise it with all colleagues across the organisation.

4.2 Making knowledge core

To help ensure that the development of collections knowledge is embedded across the organisation, make sure it is included in museum policies and procedures, particularly those that relate to staff development such as induction and appraisal. Knowledge sharing should also be built into departmental training plans.

This doesn't have to be onerous. There is a wide range of ways to develop and share collections knowledge, no matter what someone's role is in the organisation. Formally acknowledging this area of development within the training and development process will support staff to reflect on what they've done and reinforce the knowledge that they've gained.

4.3 Planning for success

In an ideal world, most learning and development should take place within a process of planned professional and personal development and not in an ad hoc manner. This could be through your organisation's personal development process, if you have one, or through a formal scheme such as the Associateship of the Museums Association (AMA) (<http://www.museumsassociation.org/careers/associateship-of-the-museums-association>). The use of CPD plans and learning logs helps support staff development effectively.

Mary Brooks, Monument Fellow at York Museums Trust, tried to apply the principles of reflective professional practice to her work there. For example, she kept a daily diary of her work – not to share with colleagues, but to enable her to think through the work she had been doing each day.

The benefit of planning and reflecting on learning in this way is that it helps ensure that plans reflect the needs of both the individual and the organisation. It helps to focus learning and also provides a framework to reflect on and embed any learning, which should extend the value of any activities being undertaken. It can also provide an opportunity to recognise the impact that increasing collections knowledge can have on the development of a range of other skills, such as communication, customer care and general confidence.

WORKING TOGETHER AND DEVELOPING PEOPLE

4.4 Empowering staff

As with all areas of professional development, being motivated is one of the key success factors. Creating a working environment where members of staff feel more empowered and valued can help them to be more motivated, proactive and innovative in their work.

Alongside developing as learning organisations, museums can really benefit from trying to create more inclusive working practices. Such working practices can help improve communication, focus activity, develop new thinking and share existing knowledge. This is central to the development of collections knowledge. Small things can contribute to this way of working:

- Hold more regular all-staff and department meetings, and find ways of encouraging everyone to participate
- Create cross-departmental or 'diagonal slice' teams to work on specific projects or areas – for more information about how this has worked in some museums see the MA's Culture Change guide (<http://www.museumsassociation.org/download?id=298384>)
- Brief all staff about future plans and activities. This will help them to understand how they can contribute.

4.5 Choosing the right approach

Everyone learns in different ways, and this Toolkit sets out a comprehensive array of activities that can be used to develop and enhance people's collections knowledge. People who work in museums often look for formal learning opportunities and academic courses as a means of developing collections knowledge. But the Monument Fellowships used work-based and informal learning very effectively. You can often help people start a programme of development by encouraging them to think afresh about the way they work and who they work with. The most common informal and work-based activities to consider are:

- Study visits
- Work-shadowing or secondments, either inside or outside the organisation
- Taking on new projects or responsibilities
- Mentoring
- Networking.

Most of these activities are reasonably low cost or cost free, although they do require you to set aside time. Whatever you plan, make sure you keep activities varied and interesting.

4.6 Sharing it widely: the power of networking

So much of what we learn about what is going on in different departments or museums is through word of mouth. Networking has always been key to sharing collections knowledge, either informally or through specific events and conferences. However in these harsher economic times, with perhaps fewer opportunities for formal training and events, finding ways of getting together and sharing experiences and knowledge will be essential.

It is important that people find opportunities to meet with colleagues in other departments and, especially for people who work in small museums, with colleagues in other organisations, if knowledge and the techniques for developing it are going to be shared as widely as possible. This can be as simple as a day spent in another museum. By coincidence, two Monument Fellows in Scotland, Jim Wood at National Museums Scotland and Dan Mackay at Summerlee, the Museum of Scottish Industrial Life, were both working on industrial collections at the same time.

Staff from National Museums Scotland visited Summerlee for the day to talk about the work both Fellows were doing, a visit one of the people who took part described as "inspirational". Be creative about finding opportunities for networking and do not dismiss it as an unaffordable luxury when times are hard.

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Appendix 1: A history and overview of the Monument Fellowships

The Monument Fellowships were established by the MA in 2006, with funding from the Monument Trust. The Fellowships provided the opportunity for a retired collections specialist to spend time working in a host museum, sharing unrecorded collections knowledge. Most of the Fellows undertook their Fellowship in the museum in which they worked prior to retiring. But some Fellows wanted to work with other museums whose collections they knew well. All host museums had to be Accredited and could be in any part of the UK. All Fellows were also required to spend some time sharing knowledge with the broader museum sector, as well with successors and former colleagues in the host museum.

The Monument Trust's initial grant supported two rounds of Fellowships. 15 Fellows took part in these two rounds, which made up the first phase of the Fellowships between 2007 and 2009. The MA commissioned an evaluation of the programme at this stage and the

Monument Trust agreed to fund two further rounds of Fellowships in a second phase, which ran from 2010 to 2011, with a further 15 Fellows taking part. Some changes were made to the details of the Fellowships for the second phase, which are discussed below. But the outline of the programme remained constant.

All Fellows had experience as either conservators or curators, although one or two had also worked in other roles, including in higher education. All had significant collections knowledge, which they wanted to share with former colleagues and the broader sector.

In the original conception of the scheme, the MA had envisaged that the Fellow would work most closely with a single direct successor. But this proved to be unnecessarily limiting. For one thing, very few of the Fellows actually had a direct successor, as retirement of a long-standing member of staff is often an opportunity for a reappraisal of staffing structures. More importantly, many of the Fellows found opportunities to share their knowledge with a wide range of staff, including front of house staff and volunteers, and this was actively encouraged in the second phase of the programme (see overleaf).

The Fellowships did not support new research. Their purpose was to pass on existing, but unrecorded, subject knowledge as well as the techniques and approaches that people working in museums need to use to build their own subject knowledge. Fellows were asked to spend a large proportion of their time working directly with colleagues, either in groups or on a one-to-one basis. In practice, some Fellows concentrated on producing written resources. Although face-to-face knowledge sharing was a richer experience for both Fellows and their successors, this did depend not only on the successors being able to set aside sufficient time, but also on the Fellows having good coaching and mentoring skills. One of the successors who took part in a Fellowship in the first phase wrote in his evaluation about the distinction between 'information' and 'knowledge'. Information is fact-based and can be written down. Knowledge is more about developing skills and understanding, and tends to depend upon more active approaches to teaching and learning. The most successful Fellowships were not just about passing on facts, but about guiding and training a new generation of museum professionals and helping individuals learn the techniques that they would need to understand and interpret objects for themselves.

As well as working at their host museum, Fellows were required to run a series of knowledge sharing events for the wider museum community. Some of the most successful events were organised in partnership with specialist groups, who advised on areas of training need and helped advertise the events. These events took many different forms. Some were fairly straightforward training sessions, for example, helping non-specialists learn to identify particular kinds of objects. Others were more collaborative, based on a group of experts pooling knowledge. What all the events revealed was that there is significant appetite in the broader sector for events related to collections knowledge.

Fellowships in the first phase were 50 or 100 days in length, spread over six months to a year. In the second phase, all Fellowships were for 50 days initially, with the possibility of short extensions where this would be beneficial. Fellows were paid a daily rate of £100. This modest sum was agreed in anticipation that the Fellows would also have some pension income. And in fact some Fellows said that the money was a less important factor in making the Fellowship feasible than the recognition and status that came from being part of a national scheme.

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All host museums had to agree a supervisor to manage the programme. Host museums and Fellows were free to decide who the Fellow should work with to share their knowledge. All Fellows and host museums had to develop a detailed workplan for approval by the MA. The MA provided training and support to help programme the Fellowships, to ensure they ran smoothly and to assist with planning knowledge sharing events. Fellows had access to a small budget for expenses such as travel, materials, hosting knowledge sharing events and training sessions.

How the scheme developed

As a result of the evaluation of the programme at the end of the first phase, the MA made some changes for the second phase. These did not change the essential character of the programme but aimed to improve the impact of the Fellowships and make them a more satisfying experience for those taking part.

In the first phase, the most successful Fellowships were those that were linked to core organisational priorities in the host museum, whether a public outcome such as a redevelopment, or new approaches to staffing and collections management. One or two Fellows in the first phase struggled to make an impact where their project was seen as peripheral or coincided with other major projects, making it hard for staff to allocate time.

In the second phase, host museums were asked to demonstrate that the project was a priority for them and that it was closely linked to the museum's core objectives. To try to ensure that host museums were genuinely supportive of the projects, applications in the second phase had to be led by the host museum, rather than by the Fellow as they had been in the first. Host museums had previously been encouraged to provide partnership funding for 50% of the Fellow's daily rate. This became a requirement in the second phase (unless there were exceptional circumstances), again to help ensure the host museum was serious about the project.

The Fellowships in the first phase were extensively reviewed and monitored, with assessment visits and mid-term monitoring visits from MA representatives. The aim of this monitoring was not so much to ensure accountability, as the grants awarded were relatively small, but rather to learn lessons from the Fellowships that could shape a second phase and inform knowledge sharing and succession planning in the broader sector. Monitoring and evaluation were much more light-touch in the second phase.

Something that emerged from the first phase was that very few retiring museum professionals are simply replaced by a direct successor with equivalent responsibilities; retirement is usually an opportunity for some sort of restructuring.

Moreover, many museum professionals take early retirement at a time of funding crisis, often at very short notice. The second phase of the programme took account of this, especially in view of the funding climate that has seen many museums facing a time of financial difficulty. The MA actively encouraged Fellows to share their knowledge widely with a range of colleagues, including front of house staff and volunteers, to improve the sustainability of collections knowledge.

Appendix 2: Knowledge sharing Fellowships

Workplan guidance and template

The purpose of the workplan is to:

- Help staff from the host museum plan their commitment to the Fellowship. This includes both practical matters and strategic questions
- Help the Fellow structure his or her work, and ensure that the Fellowship is a satisfying experience.

Things to consider in planning the programme

These are some of the things that worked particularly well in the Monument Fellowships from the MA, on which this guidance is based. Not all of this will be relevant to you, but it may be helpful to think about how these points apply to your project:

The most successful projects were thoughtfully constructed and had a clear sense of purpose, but allowed enough flexibility to enable Fellows and colleagues to respond to unforeseen opportunities where appropriate.

- Successful projects combined sharing knowledge with developing knowledge: that is, the Fellow spent some of their time passing on information, but also spent time helping colleagues understand how to build their own collections knowledge. This was achieved, for example, by explaining identification techniques and research methods
- Fellows worked with a range of museum staff, including junior curators, volunteers and front of house staff
- Fellows spent a large proportion of their time working face-to-face with colleagues and in stores or galleries with the objects they were working on
- This was balanced by some time working on written resources, such as manuals, and adding to collections records
- The host museum and Fellow were realistic from the outset about how many days colleagues would be able to spend working with the Fellow, and planned the project accordingly
- Fellows worked with regional or specialist groups in planning the elements of their project, such as training events, that involved working with the wider museum community.

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Workplan template

Name of Fellow:		• Details of the number of days the Fellow plans to spend on each of the areas of work outlined above	
Host museum:		Links to core priorities and other projects:	
Name and job title of project manager/supervisor:		• Think about how this project relates to the museum's core priorities	
Name and job titles of successor(s), or staff members identified who will be working with Fellow on the knowledge transfer:		• How will this project relate to other things happening in the museum during the period of the Fellowship?	
Title of project:		Practical arrangements:	
Aims of the project: <i>Summarise the aims of the project and include the name of the collection that forms the focus of this project</i>		• Where is the Fellow going to work?	
Outline of main areas of work the fellow will be undertaking: <i>Outline the main elements of the project in a series of brief bullet points</i>		• How many days each week will they spend at the museum?	
Project timescale:		• What proportion of their time at the host museum will be spent working directly with colleagues?	
• Key dates for the project including start and finish dates and important milestones		• How will you ensure that those working with the Fellow can fit the commitment around their other work?	

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Workplan template (continued)

Working with colleagues/ capturing knowledge: <i>Think about how the Fellow and successors will work together to share and develop collections knowledge</i> • How will the Fellow be working with successors and colleagues in order to pass on knowledge? • What processes/methodology will be used?	
Working with the wider museum community: <i>Think about whether the Fellow will be able to share any knowledge with the wider museum community</i> • Who will benefit? • What format will this take? • What will the outcomes be?	

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Workplan template (continued)

Project outcomes: <i>Think about the planned outcomes for the project. This should include:</i> • How the host museum and colleagues will benefit from this project • How the wider museum community will benefit from the project		Review and evaluation: <i>Think about:</i> • How the project will be monitored internally • How often this will take place • How review will feed into and inform the project	
Project outputs: <i>Think about the planned project outputs for the project. This should include:</i> • Details of what the museum will be left with as a consequence of the project, such as a publication, database, website, etc			

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Appendix 3.

Monument Fellowships Checklist for organising your knowledge sharing workshop

Sharing knowledge is about working in new ways, and building new relationships:

*...‘Communities of practice’ demonstrate that as people find each other and exchange ideas, good relationships develop and a community forms. This community becomes a rich marketplace where knowledge and experience are shared. It also becomes an incubator where new knowledge, skills and competencies develop.*¹

Specialist expertise encompasses the human relationships and ‘how’ of sharing and passing on collections knowledge, to support others to become experts too.²

Collections knowledge is not a fixed entity, but dynamic. Expertise creates the potential to unlock and expand new knowledge, and encompasses a wide range of sources and collections, beyond any single institution and individual.

*People need to develop systematic diagnosis – otherwise they are not able to progress beyond simple ‘found knowledge’ – they need these skills so they have the flexibility to build on and add to their knowledge.*³

Thus, it is useful to think about sharing your judgement as you encounter new and unfamiliar things, as well as describing ‘prior’ knowledge of collections with which you are already familiar. Some of the Monument Fellows described this as “externalising our thought processes”.⁴

It is useful to think about knowledge sharing as a learning, and social, experience:

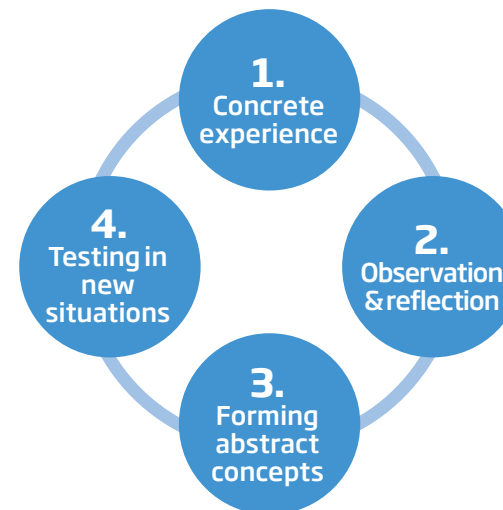
*Learning is a process of active engagement with experience. It is what we do when we want to make sense of the world. It may involve developing or deepening skills, knowledge, understanding, awareness, values, ideas and feelings, or increasing our capacity to reflect. Effective learning leads us to change, develop and to the desire to learn more.*⁵

We can deepen our impact and increase our own and others’ learning by consciously working with Kolb’s learning cycle, which is simply: act – reflect – understand/analyse – plan:

Thus, if we want to support people to learn and develop expertise, we would plan our ‘event’ to start with this ‘active engagement with experience’, and move people through the cycle of learning.

It’s useful to think of the diversity of learners, and learning styles of the people you are likely to be working with:

- Bodily-kinaesthetic (‘messy’ learners)...
- Logical-mathematical...
- Visual-spatial...
- Linguistic...
- Musical...
- Naturalist...
- Intrapersonal...
- Interpersonal...⁶



Who do you want to engage?

Monument Fellows set out to involve at least these people:

- fellow conservators and curators in their own and other museums with relevant collections – including ‘curators without specialist knowledge’
- broad range of staff in their own museums – educators, front of house, in one case gardeners
- committed volunteers
- students from local museum studies courses
- members of subject specialist networks.

How many people should you aim to have at the workshop? To work together as a group, with dialogue and problem-solving, 12 to 16 is a good number.

You could run a second workshop if there is greater demand and interest from different audiences.

¹ Wheatley, MJ (2002) Supporting Pioneering Leaders as Communities of Practice: How to Rapidly Develop New Leaders in Great Numbers <http://www.margaretwheatley.com/articles/supportingpioneerleaders.html>

² Murch A and Porter G (2009) The Museums Association's Monument Fellowship Scheme: Succession planning with post-retirement Fellowships. Evaluation of the pilot phase.

Gaby Porter+ Associates

³ Monument Fellow, interviewed for the above evaluation in 2009.

⁴ Monument Fellows planning workshop, Manchester, 2007.

⁵ MLA (Museums, Libraries and Archives Council) definition adapted from Campaign for Learning, 2004.

⁶ Gardner H (1983) Frames Of Mind.

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How will you make best use of your time, to share with and transfer to others what you know and do?

- Some Monument Fellows set out to share and capture how they worked with collections and exercised their judgement. Their experience suggests that this is best done through hands-on sessions, using both familiar and unfamiliar objects
- Some Fellows developed handling guides and information guides which participants could then use, working in smaller groups to discuss their interpretation of the objects
- Is one session enough? Feedback from Monument Fellows suggests that participants needed more than a one-off session in order to expand and consolidate their knowledge, skills and confidence. Collections experts might, for example, offer to support small clusters of museums with relevant collections to begin to address their needs, and further develop their skills, knowledge and shared understanding through working together. For example, the expert might hold further practical sessions at museums with related collections within the region, addressing needs and priorities within the collections of each museum and comparing them with others. This might in turn lead to collections reviews and the creation of a more coherent 'shared collection'.

Practical guidance for your session:

Below are some pointers to help you plan your session

- Do you need to find out more about your audience and their questions in advance of the session, so you can build on these as 'live' issues at the event? Should you email them in advance and ask them to get back to you if they have any burning issues/questions, or if they have 'mystery objects'?
 - Focus on the things that you can only do together as a group. Is there information which is essentially not going to change? If so, can you send it out in advance? Circulate as a handout? Point people to website and/or publication?
 - Think about the programme as a series of questions/challenges which you will work on together
 - Break up the session into shorter 'chunks' with different activities and breaks
 - Build lots of time for practical work/working in pairs and small groups.
- In your programme, 'top and tail':
 - Invite people to introduce themselves at the beginning: name, workplace, what they want from the session. Ask them to do this in less than ten words
 - Write what they want from the session on a flipchart (don't comment on their points, don't interrupt them). You can do this with up to 16 people, just allow enough time – less than one minute per person
 - Revisit these goals during the session and towards the end – have you covered them?
 - End by inviting each person to offer a positive reflection – for example, "one thing you have found valuable/enjoyed about this session". (Don't respond to their points, but offer your own reflection.)
 - Do you want other people to assist you, for example, by leading discussions at different tables? If so, who will you call on? (It's a development opportunity for them, too.) How will you brief and prepare them?

- If you decide to use a data projector and presentation, use it only to lay out the overall structure of the programme and key questions; or to elaborate on specific points, for example, about objects/other collections which you can't have in the room. Consider preparing your presentation and then printing handouts rather than using a projector, so people are not staring at a wall
- Think about how you will follow up after the session. Will you give them your contact details? Will you filter enquiries through someone else?

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Where will you hold your session?

- Who do you want to come to the event? Where is convenient for them to meet?
- Will you need access to collections? Will you need to bring collections in?
- How accessible is the location physically? Is there public transport to the building? Within the building?
- Are there security restrictions to access the location, for example, are passes required?

How will you use the space?

- Smaller, round tables with four to six chairs are best ('cabaret style') because they allow discussion and joint working
- Do you need a flipchart? (Probably – see note below)
- Do you need a data projector and screen a laptop?
- Do you need a separate table/room for collections?
- Do you need a separate table/room for catering?
- Can you get into the room on the day before or earlier in the day to set up?

What joining instructions will you provide?

- Send out invites with an outline of the programme to delegates and/or phone them. How will they confirm attendance? To whom? By when?
- Send out full programme, parking information, any security information and any advance reading for people who confirm
- Email a reminder to people a couple of days before the event
- Compile and print out copies of a delegate list with contact details before the event.

What will you bring with you on the day?

- Name badges or stickers
- Delegate list with contacts
- Table covers and gloves if you are handling objects
- Post-its, white tack
- Stationery – pens, pencils, flipchart paper
- Copies of handouts; programme; delegate list
- Evaluation forms
- Water (and/or access to fresh water), tea, coffee, sugar, milk, cups, fruit, biscuits, sandwiches, plates and serviettes – any or all as required.

Appendix 4: Collections review and knowledge sharing

Collections knowledge has to support the mission of a museum and help it meet its aims. As museums' priorities develop, museums need different kinds of collections knowledge. Collections reviews offer museums a way of prioritising collections knowledge, as well as an opportunity to take a strategic approach to collections development.

A collections review is a systematic way of looking again at an existing collection, assessing its significance and thinking about how it can best be used in future.

Several of the Monument Fellowships included collections reviews. And collections review is at the heart of more than 30 projects that the MA has funded through another of its programmes, Effective Collections. This section of the Toolkit offers ideas for how you can undertake a collections review in your museum. It demonstrates that collections reviews can help you and your colleagues share knowledge in a way that meets the needs of your museum.

Many museums are turning to collections review to make sense of their collections. The primary motivation may be practical – for example because storage space is under pressure, or new members of staff don't understand some parts of the collection. But the resulting improvements in collections knowledge can support the museum's work for years and decades to come. The museums featured in this Toolkit have all used collections reviews to share knowledge and also as a management tool to prioritise time and resources.

In 2009-10, the MA ran a series of training events in collections review in partnership with University College London (UCL). People who attended the training events said that they had helped them think through how their museum should approach, plan for and use a collections review. The principles below emerged from discussion at the training sessions and echo the thinking throughout this Toolkit. This section includes case studies of three collections reviews, which have some common features but which addressed different situations. These case studies demonstrate that collections reviews can be appropriate and useful for a range of purposes.

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Step 1: Identify the need - why are you doing a collections review? What are you trying to achieve?

Considering what your museum aims to achieve from a review will determine how you go about doing it, what questions you ask and the resources you need.

UCL Museums and Collections began a review of all of the collections held across the museums and academic departments of the university in 2007. They wanted to know how big their collection was, and where it was. Their aim was to get a snapshot of the collection from which to set priorities and action plans for each of the departments caring for and using the collections. This clarity of vision defined how the team at UCL designed their review. Within an 18-month period UCL Museums and Collections discovered that they had 380,000 objects spread across 19 collections in 190 different stores. They had also drawn attention to key items for teaching or display, highlighted priorities for collections care or conservation, and identified candidates for a programme of disposals.

The Old Tools New Uses project, run by the Scottish Transport and Industrial Collections Knowledge network (STICK) and funded by Effective Collections, ran through 2010-11 and reviewed domestic technology collections held by museums across Scotland.

Collections included sewing machines, typewriters, woodworking and other hand tools in museums from Ayrshire to Aberdeen, and the review was undertaken by a single subject specialist, David Woodcock.

This review aimed to compare collections held by different museums to see where the overall strengths were, where there was a national gap in collecting, and where there was duplication that allowed for disposal. David produced a master catalogue of the domestic technology collections held by participating museums and the museums made collaborative decisions on disposal. Some of the disposed items were refurbished and put into use in communities in Africa, through a partnership with the charity Tools for Self Reliance. A schools resource is now being written for use in museums with the collections that are retained.

Four museums in the North West undertook an Egyptology collections review in 2009-10, with funding from Renaissance North West. Three Egyptology postgraduate students from Liverpool University each worked with a museum for one day a week over a year, one based at Blackburn Museum and Art Gallery, one at Kendal Museum, and one at Towneley Hall in Burnley. They reviewed Egyptology collections at these museums and identified objects excavated by John Garstang, an archaeologist who worked extensively in Egypt and Sudan in the early twentieth century.

They also linked these objects with the archival material held at the Garstang Museum of Archaeology in Liverpool. Stephen Snape of the Garstang Museum commented, "One of the key aims of the Garstang Review was to establish sustainable approaches to knowledge transfer, linking Egyptological expertise at Liverpool University and regional Egyptology collections in the North West." Each museum received detailed records on the items in their collections to allow them to use the collections in the future and work with museums with related material.

Step 2: Identify the resources - who will work on the review? How much time, money and space do you have?

In the case of the Garstang review, external experts spent considerable time on the collections and the whole review was externally funded by Renaissance North West as a time-limited project. One of the challenges was to ensure that the permanent staff at participating museums were actively involved in the project. As with the Monument Fellowships, the museums participating in the review wanted to ensure that there were opportunities for person-to-person sharing of knowledge and so they had to make sure that the people involved were able to set time aside.

The museums were happy to make this a priority because of the nature of the subject matter; few museums have specialist Egyptology knowledge, and yet Egyptian collections are extremely popular with visitors and part of the national curriculum for schools.

Old Tools, New Uses received external funding from Effective Collections, but it was an ambitious project with many partners, so significant amounts of staff time were required to coordinate the project. National Museums Scotland took on this role as part of STICK. The project also recruited specialists to undertake the review and to write the schools resource. Recruiting suitable individuals took some time and the success of the project relied heavily on these individuals. While partnership projects have huge potential, their complexity means that strong project management and good communication are required to make the most of limited resources.

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UCL's resources for their review came from core funding and small amounts of grant support within the university. This meant the team working on the review was small considering the scope of the collections. One full-time and one part-time member of staff undertook the vast majority of the review work looking at all of the objects in the collections, and they had tight deadlines within which to complete the review (18 months for data gathering, a further six months for analysis and creating actions plans for departments). The review was a sizeable investment for UCL Museums and Collections, so had to gather a range of information about collections' significance, use and care. The relatively scarce resources meant that the review produced an overall snapshot of the collection but offered less depth of collections knowledge than the other examples. However its strength is that it has linked together existing knowledge and shared it across the university.

Step 3: Identify your stakeholders – who are your stakeholders? Who do you need to get on board for the review to have impact?

A review only has impact if people are committed to participating and using the information gathered. The Old Tools New Uses project had a lot of stakeholders to work with. The project team needed to convince museums to participate by providing information about their collections. They had to advocate for disposal and disseminate the schools resource. The team thought about this early on and encouraged museums to participate with the incentive of receiving the schools resource further down the line. However, getting museums with small domestic technology collections to take part was difficult. Whereas the Garstang review team found museums eager for more information on their Egyptology collections, museums found it less easy to see the appeal of reviewing this material. Recruiting participants required a personal approach and enthusiastic advocacy for the subject from David or a member of the STICK steering group. Some participants in local museums felt anxious about participating, concerned that working with a specialist might reveal their own lack of knowledge, and David needed to build their confidence in this respect.

Stakeholder support was equally important for UCL. In their case the bulk of the review was done by staff not necessarily expert in the particular field being reviewed. In addition, the review specified disposals as an outcome, so some members of staff were understandably wary. The process of consulting subject specialists, and assuring them that the review was not a form of critique of their collections or stewardship, was vital for the entire UCL team in order to support the findings of the review and implement the actions identified for each department.

In the case of the Garstang review, Renaissance North West and the Garstang Museum developed the idea for the project before approaching the partner museums. The documentation and shared collections knowledge from the project fed into redisplay at the participating museums and improved loan boxes, and a touring exhibition across the four venues is planned for 2011–12. Such tangible outcomes demonstrate the benefits of sharing collections knowledge to stakeholders and governing bodies.

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Step 4: Identify a methodology – what information do you need? Is there a methodology you can adapt for your particular needs?

Many museums have undertaken collections reviews, on varying scales, with varying budgets and for different reasons. While it is important to tailor your review to the needs of your particular museum, it is also likely there is an existing methodology that you can adapt. UCL developed an assessment rubric and accompanying survey form. The rubric was printed on a double-sided sheet for reference, one side dealing with the standards of care of a given collection, the other with the significance and usefulness of the objects to UCL. The full rubric is available at the end of this document.

Each group of objects was graded against each criterion, using five A to E review categories. The team chose to assess the collections according to 'review units' such as a drawer or shelf to speed up the process – roughly counting the number of objects in each unit and assessing the group against the criteria. The team assessed each review unit according to the highest example of value and the lowest example of collections care. This combination was a powerful way of highlighting where action was needed. After an intense period of data gathering, the team analysed the data and created actions plans for each museum or department caring for a collection. The data has been used internally to prioritise improvements to collections care, to promote use of the collections for teaching, to inform emergency planning and even to lever funding for storage improvements and conservation. The full UCL Toolkit is available at: <http://bit.ly/jjzHAb>.

The UCL rubric was used as part of Reviewing Significance in 2010, a project run by Renaissance East Midlands to review collections in nine museums in the region. Reviewing Significance combined the UCL methodology with creating significance statements for objects or groups of objects: <http://bit.ly/m1RKsB>.

As Old Tools New Uses and the Garstang review both rely on reviewers working closely with a collection, the review format was more flexible. The links in the further resources section provide more information about these and other collections reviews.

Further resources

Museum Practice on collections reviews: <http://www.museumsassociation.org/museum-practice/collections-reviews>

Old Tools New Uses on the STICK website: <http://bit.ly/iE6Zsj>

Revealing Collections, published in 2011 and detailing the five recent reviews funded by Renaissance North West (including the Garstang review): <http://bit.ly/mTQ9lg>

What's In Store, published in 2008 and detailing three pilot collections reviews funded by Renaissance North West. This also includes a review methodology: <http://bit.ly/jaZtuM>

UCL rubric (see overleaf)

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Teaching		Research	Public Engagement		Historical & Intellectual Development		Uniqueness	Ownership	
A	- Actively used in teaching at UCL - Part of running undergraduate / graduate programme - Fosters interdisciplinary	- Actively used in research at UCL and the wider community - International excellence, research innovation - Fosters interdisciplinary research	- Permanently on display with access to the general public - Engaged in outreach teaching programmes, widening participation in wider community, e.g. loan box use - Regularly used in public events, workshops and demonstration.		- Of international importance, making a fundamental and long term contribution to intellectual thought or the study of a discipline, and integral to UCL history, for example, its iconicity or historical / cultural value		- Object one of a kind, unique, rare, unusual or example of extinct species - High media profile - High wow factor	- Owned by UCL - Proof of purchase, letters of ownership / documentation	
	- Potential use in teaching at UCL - Has been used for teaching within last 5 years - Proposals to integrate into undergraduate / graduate programmes - Potential to foster aspects of interdisciplinary teaching	- Potential use in research at UCL or wider community - Potential to foster some aspects of interdisciplinary research	- Permanently displayed but not accessible to the general public - Often displayed with access to the general public - Occasionally used in public events, workshops, demonstrations, talks etc - Occasional handling / loan box use		- Of national importance, making a significant or short term contribution to the study of a discipline, and integral to UCL history - Related to important person / intellectual event or development at the university or in university department		- Unique to UCL and London	- Owned by UCL - No letters of documentation as incorporated within collection over time	
	- Collected and used as part of teaching collection but no longer used - Potential for use in future	- Collected as part of research collection but no longer used, potential for use in future	- Have been displayed in past - Have been used in handling or as part of loans boxes in the past, but not currently in use - Potential for future exhibitions and increased handling/loan box use		- Of importance to the history of a department at UCL through its intellectual/ historical association		- Unique to UCL, similar objects held in other London institutions	- Collected by UCL staff for research/ teaching with no letters of ownership	
	- Little potential for current use, but could be relevant in future	- Little potential for current use, but could be relevant in future	- Never used in display and exhibitions - Never used in handling or as part of loans boxes, but has potential to be used in this way		- Of little importance to the history of a department or tangentially related to UCL through its intellectual/ historical association		- Duplicate objects, one of many held at UCL or in London	- Permanent loan, not owned by UCL - Needs reviewing	
	E	- Never used for teaching and no potential to do so - No future value in teaching	- Never used for research and no potential to do so	- Not suitable for display - Not suitable for loan box / handling use		E1 No historical/intellectual importance to UCL department and/or wider community E2 History Unknown		- Multiple objects held at UCL, representative sample of a common type or types - Low wow factor	E1 Not owned by UCL, to be investigated E2 Ownership Unknown

	Storage Room Security	Storage Security	Storage Environmental Condition	Storage Space	Storage Housing Materials	Condition Assessment	Documentation
A	- Secure room - Locked and/or alarmed - 24 hour security cameras or guards - Strict access controls, with key access limited to selected group of authorised individuals - Frequently visited	- Secure storage - Displays fitted with alarms or security glass - Cabinets and drawers locked - Strict access controls for keys - Security camera, guards or museum attendant at all times	- Protection from dust and daylight - Good environmental control, stable temperature, and humidity. - Constant environmental monitoring and condition checks, - Regular cleaning - Dedicated disaster plan - Full integrated pest management	- Dedicated, safe storage area with customised racking/shelves and suitably labelled - Individual objects easily retrievable, no overcrowding - Provision for easy movement of large/heavy objects - Location plan available - Area health and safety compliant	- Inert store furniture and other building materials - Conservation grade housing/ materials used - Objects on display well supported or mounted with inert materials	- Stable material - Good condition - No conservation problems	- Fully accessioned - Full and complete supporting documentation - Information held on computer database following MDA Standards - Documentation procedural manual
B	- Secure room - Locked and/or alarmed - Strict access controls <i>Security cameras or attendant available during opening hours/visits only</i>	- Secure storage - Displays fitted with alarms or security glass - Cabinets and drawers locked - Strict access controls for keys	- Protection from dust and daylight - Regular condition checks and environmental monitoring - Dedicated disaster plan - Basic pest management <i>No environmental control</i>	- Dedicated, safe storage area, adequate racking, suitably labelled - Individual objects easily retrievable, no overcrowding - Provision for easy movement of large/heavy objects - Area health and safety compliant <i>No location plan, racking is not customised</i>	- Objects have conservation grade housing/support <i>Furniture not inert</i>	- Stable material - Minor cleaning: stable and not at risk	- Accessioned - Material listed on basic computer database - Supporting documentation
C	- Secure room - Locked - Strict access controls <i>No security cameras or attendant, infrequently visited</i>	- Room locked - Cabinets and drawers locked - Strict access controls to keys <i>Displays non-secured, not alarmed.</i>	- Selective dust and daylight protection - Selective environmental monitoring, condition and pest checks <i>No environmental controls, no dedicated disaster response plan for this area, little or no cleaning</i>	- Dedicated, safe storage area, adequate racking, suitably labelled <i>No location plan, racking not customised, some overcrowding and access restrictions, not fully health and safety compliant</i>	- Conservation-grade materials and housing for selected objects/objects at risk <i>Furniture not inert</i>	- Stable material but needs monitoring - Some risk: some restoration or repair conservation desirable	- Accessioned - Not on database - Paper documentation
D	- Doors locked <i>No security cameras or guards</i> <i>Multiple key access, infrequently visited</i>	- Room locked <i>Cabinets and drawers not locked, displays non-secured, not alarmed, easy access to keys</i>	- Erratic environmental monitoring and condition checks - Daylight and dust not excluded <i>No environmental control</i> <i>No disaster planning</i> <i>No pest management</i>	- Dedicated, safe storage area <i>No location plan, unsuitable racking, overcrowding and access restrictions, inadequate labelling, not health and safety compliant</i>	- Objects given some support or protection using non-conservation grade materials - Basic boxing/sheeting etc <i>Furniture not inert</i>	- Unstable material - High risk: immediate action required - Specialist conservation required - Major restoration, additions or loss	- Not accessioned - Not on database - Paper documentation
E	- No security	- No security on storage	- Unstable and unmonitored environment <i>Daylight and dust not excluded</i> <i>No environmental/pest control or monitoring</i> <i>No disaster planning</i>	- Unsuitable storage <i>No dedicated storage area, no organisation of boxes or racking, overcrowding and objects not accessible, no labelling, not health and safety compliant</i>	- Furniture not inert - No conservation grade housing/packing - No support or mounting for objects - Objects stored unprotected	- Very unstable material - Beyond repair - Poses immediate risk to other specimens	- Not accessioned - Object not marked - Lacking documentation

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