

# Guidelines Developing Education and Public Engagement in Museums

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# LEGAL NOTICE

## Guidelines

### Developing Education and Public Engagement in Museums

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## PREFACE

Education and public engagement are key tasks of museums today. They serve to democratise and open museums to diverse audiences. Now more than ever, museums must acknowledge their social responsibility as educational actors so that they can facilitate greater accessibility and achieve their full potential as agents of change, of cohesion and of a diverse society.

Education and public engagement work has increasingly become part of what is thought to be fundamental communication and management tasks in museums. The guidelines in this publication describe key factors of success in education and public engagement work from a contemporary perspective and emphasise the close relationship between the museum and its audience. The guidelines aim at encouraging readers to think big, while taking small steps. The objective is to firmly anchor and consolidate professional work beyond the scope of temporary project-based activities.

NEMO - The Network of European Museum Organisations, the German Association for Museum Education and the German Museums Association jointly publish these guidelines to share a European frame of orientation: How can education and public engagement in museums succeed and be relevant to an ever changing, diverse society? The guidelines provide assistance for practical approaches and further promote the international discussion.

The original version of the guidelines was developed by the German Association for Museum Education and the German Museums Association in an open process and first published in 2020 in German.



After discussing the ideas in the NEMO Working Group LEM - The Learning Museum in Portugal in 2022, the English version was developed and adapted to the needs of a European museum professional audience. We kept the main text, the quotes, and the pictures, but reviewed and added links & literature from an international perspective.

The three organisations are convinced that quality and professionalisation of education and public engagement work are of key importance - we will continue to vigorously work on it. We are deeply grateful for the constructive collaboration of all those who participated and provided critical expertise in the production of these guidelines.

The NEMO Working Group LEM supports peer learning and the exchange of information on museum education, audience development, intercultural dialogue, and lifelong learning among museum professionals in Europe.

**Julia Pagel**

*Secretary General  
NEMO - The Network of European  
Museum Organisations*

**Margherita Sani**

*Leader of the NEMO Working Group  
LEM - The Learning Museum*

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*President  
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*Chair  
German Association for Museum Education*



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## ABOUT THESE GUIDELINES

Education and public engagement approaches and techniques in museums are constantly changing. Consequently, the following guidelines were designed to offer ideas and provide orientation which can be flexibly applied and adapted as needed. It outlines important factors for success in the area of education and public engagement. We have provided examples of key questions, formulated from the perspective of museums, to help you review and further develop your professional activities. In the end, however, you are the only one who can develop concrete criteria which specifically apply to your work.

In the following, we refer to “education and public engagement”. This also encompasses the traditional term “museum pedagogy” and emphasises the wide array of formats and the heterogeneity of the audience. The term “audience” refers to both visitors and non-visitors alike.

The guidelines offer recommendations on how staff can develop and further professionalise education and public engagement at their museums independent of the size and organisational form of their respective museum. Many things can be implemented step-by-step which the audience will quickly appreciate.

The guidelines were developed in consultation with German museum educators, curators and directors who shared their individual perspectives and experience with us. They are employed in numerous museums of varying subjects, sizes and organisational forms. Our mutual goal was to design guidelines which were as application-oriented as possible.





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**THE BASICS.**  
**EDUCATION AND**  
**PUBLIC ENGAGEMENT**  
**IN THE MUSEUM**

## **WHAT DO WE MEAN BY MUSEUM EDUCATION AND PUBLIC ENGAGEMENT?**

Society is constantly changing. It has become more pluralistic and digitalised every day. More and more people are seeking opportunities to participate and have a say in decision-making. Museums are also encountering new social and political expectations. If museums wish to remain relevant, they address these ideas: Museums play an influential role in, with and for society, and are part of its development. In this process, education and public engagement work utilises a diverse range of tools and experience, and continuously develops these.

Education and public engagement work provides the audience access to the cultural assets of society and contributes to democratising museums and their collections. It sees itself as a partner for a diverse and actively engaged audience. The work profits – as does the entire museum – if it welcomes the audience’s questions, strives to meet its expectations and incorporates its expertise into the museum’s activities. Education and public engagement work in the museum is targeted at both the individual and society. It promotes equitable participation and is oriented around content which has relevance to the audience. In this regard, education and public engagement start by focussing on contemporary issues and promote fundamental values like democracy and sustainable development.

The terms education and public engagement combine different approaches. When we speak of “education”, the focus lies more on the initiative of the audience and represents the outcome of life-long learning processes. The term “public engagement” focuses on the perspective of the museum and is primarily intended to further the (informal) learning processes of the audience. The guidelines are based on a broad concept of learning which comprises many different facets. When we talk about education and public engagement, it is always about interconnecting different perspectives and the promoting dialogue between the museum and the audience.

## Dimensions of learning in the museum

- Knowledge & understanding**
- ▶ knowing about something
  - ▶ learning facts and information
  - ▶ making sense of something, deepening understanding
  - ▶ learning, how museums operate
  - ▶ making links and relations between things
- 

- Skills**
- ▶ knowing how to do something
  - ▶ being able to do new things
  - ▶ cognitive skills, managing information
  - ▶ social skills
  - ▶ communication skills
  - ▶ physical skills
- 

- Attitudes & values**
- ▶ feelings and perceptions
  - ▶ opinions about ourselves
  - ▶ opinions or attitudes towards other people
  - ▶ increased capacity for tolerance
  - ▶ empathy, increased motivation
  - ▶ attitudes towards the museum
  - ▶ positive and negative attitudes in relation to an experience
- 

- Action, behaviour & progression**
- ▶ what people do
  - ▶ what people intend to do
  - ▶ what people have done
  - ▶ reported or observed actions
  - ▶ changes in behaviour
- 

- Enjoyment, inspiration & creativity**
- ▶ having fun, being surprised
  - ▶ innovative thoughts, creativity
  - ▶ exploring, experimenting and making
  - ▶ being inspired

*The overview is based on the Generic Learning Outcomes of the Museums, Libraries and Archives Council, England.*

Education and public engagement are consequently situated in the context of a comprehensive cultural education of aesthetic, artistic, (cultural) historic, political, scientific and technical dimensions. They frame the museum as a place of encounter and dialogue, a place to spend one's free time, to learn and experience new things, to find enjoyment, feel at home and explore with a critical eye.

## **EDUCATION AND PUBLIC ENGAGEMENT AS KEY TASKS**

Education and public engagement are a key responsibility of a museum. In the same way every museum needs a collection concept, every museum should also have its own educational concept. This educational concept should be developed in coordination with the staff in the education and public engagement department and backed by all employees. The concept contains the respective guidelines and quality criteria of the individual museum. It provides the groundwork for concrete areas of activity and necessary structures. For example, the concept stipulates the conditions for holding meetings in various working areas on a regular basis, creating teams and setting clearly defined responsibilities.

## **FRAMEWORK CONDITIONS**

For education and public engagement work to succeed, sustained, long-term resources specifically earmarked for this purpose are required. These include, for example, communication- and methods-based competence, professional knowledge of current discourse, cultural political contexts and subject-specific didactics. If museums have established a personnel structure, specific job profiles are also available. Moreover, education and public engagement work is also influenced by the available financial, spatial, temporal and personnel resources and technical equipment.

## Five factors of success in education and public engagement



**AUDIENCE ORIENTATION**



**OBJECT-RELATED FOCUS**




**MULTIFACETED METHODS AND FORMATS**



**NETWORKING**



**PROCESSUALITY**



20. - 21. Jahrhundert

*Cultural education and public engagement are the core tasks of modern museum work. At the Landesmuseum Württemberg, the management team has made it an established and desired standard to allow the cultural educators to participate in the curatorial process as an equal member with voting rights and to intensively take the audience's perspective into account from the very start.*

**PROF. DR ASTRID PELLENGAHR,  
DIRECTOR, LANDESMUSEUM WÜRTTEMBERG, STUTTGART, GERMANY**







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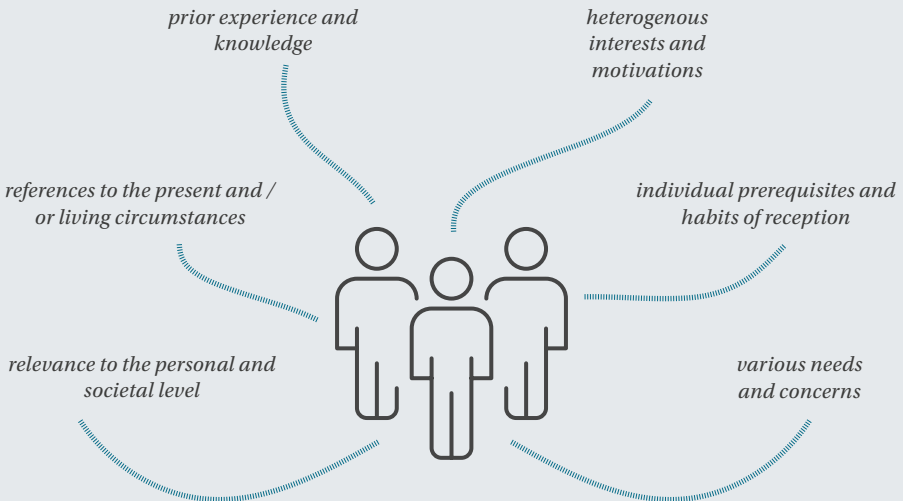
**AUDIENCE ORIENTATION.**  
**WORKING FOR AND WITH**  
**A DIVERSE AUDIENCE**

**SUMMARY**

Audience orientation is one of the central factors of success for effective education and public engagement work in the museum. It focuses on the interests, motivations and needs of visitors and non-visitors alike – also with respect to comprehensive inclusion. It contributes to making the museum a place where the issues that impact the audience are discussed. The relevance of a museum is directly tied to the quality of its audience-oriented activities. These enable the museum to become a place of cultural participation, to reach new target groups and integrate a more diverse audience. In order to develop successful education and public engagement, museums require extensive knowledge about their visitors. Such knowledge can be acquired with the help of audience research models, visitor typologies and learning theories.

Education and public engagement develops, shapes and facilitates communication between the museum and the audience. This work expands the museum’s field of influence and benefits when it actively works together with visitors and non-visitors and engages in outreach in digital space.

**What should be considered?**



The goal here is to build visitor competence and strengthen their capacity to act on a sustainable basis. At the same time, the audience enriches the museum with its many interests, questions and diverse knowledge.

## INCLUSION AND DIVERSITY

Education and public engagement seek to benefit as many people as possible irrespective of their personal circumstances. The goal is to establish a policy of comprehensive inclusion, reflected in the position of the entire museum. Not only does this concern the requirements of barrier-free accessibility as established by the UN Convention on the Rights of Persons with Disabilities, but also those which address increasing social diversity and correspond to national equal treatment acts.

These include, e.g.:

- ▶ multi-perspective points of access: responding to the interests of the audience, interconnecting multiple subject areas, ...
- ▶ target-group specific and inclusive programmes and formats: intergenerational or international formats which promote encounter and dialogue, tours for people who are blind or visually impaired, discussion groups for experts, family tours, projects for intellectually gifted youth, ...
- ▶ two-sense rule: incorporate at least two senses, i.e. hearing, seeing or touching, and wheel-foot rule: same routes through the museum for visitors with and without strollers, wheelchairs or walkers, ...
- ▶ visitor-oriented texts: understandability and optically friendly presentation, services in foreign languages, texts in Braille, sign language, plain language, ...
- ▶ inclusive guidance systems which offer orientation to all persons, ...
- ▶ team of mediators of diverse backgrounds with expertise on discrimination.



In order to best achieve these outcomes, museums should begin by identifying visible and invisible barriers to accessibility and exclusionary practices. These can be found, e.g. in the price of admissions and programme fees, the layout of entrances, the attitudes and conduct of employees, and the failure to consider certain subjects and perspectives. When it comes to programme development, inclusive and target-group specific services are not self-exclusive, but complementary factors.

## **OUTREACH**

Outreach expands the museum's scope of impact and helps facilitate direct dialogue with the audience. Outreach allows museums to address and become acquainted with groups with whom they haven't engaged before. This provides an opportunity to learn about mutual goals and interests and to strengthen the audience's relationship to the museum in the sense of audience development. In its simplified form, outreach measures, e.g. a city rally, integrate venues outside the museum into education and public engagement. Outreach holds an even greater potential of success when staged in places where the target audience tends to gather, e.g. youth centres, multigenerational buildings, parent cafés and digital space. Its impact can be especially sustainable if outreach is not merely regarded as an additive aspect of museum operation, but rather a key to shaping the institution itself. As a consequence and precondition for opening up the museum even further, outreach may initiate an "inreach" process which can positively affect attitudes, working methods, resource allocation, personnel structures and the conditions for participation within the museum.

## **PARTICIPATION**

There are countless ways to encourage people to engage and participate in the decision-making process. These range from low-threshold methods like integrating audience input into exhibitions to more involved measures like inviting the audience to co-create educational programmes. A more far-reaching participatory approach integrates the audience's perspective and expertise from the start, i.e. the concept phase of new exhibitions and programmes. To this end, the museum can establish advisory councils comprised of citizens, pupils or experts, enlist the



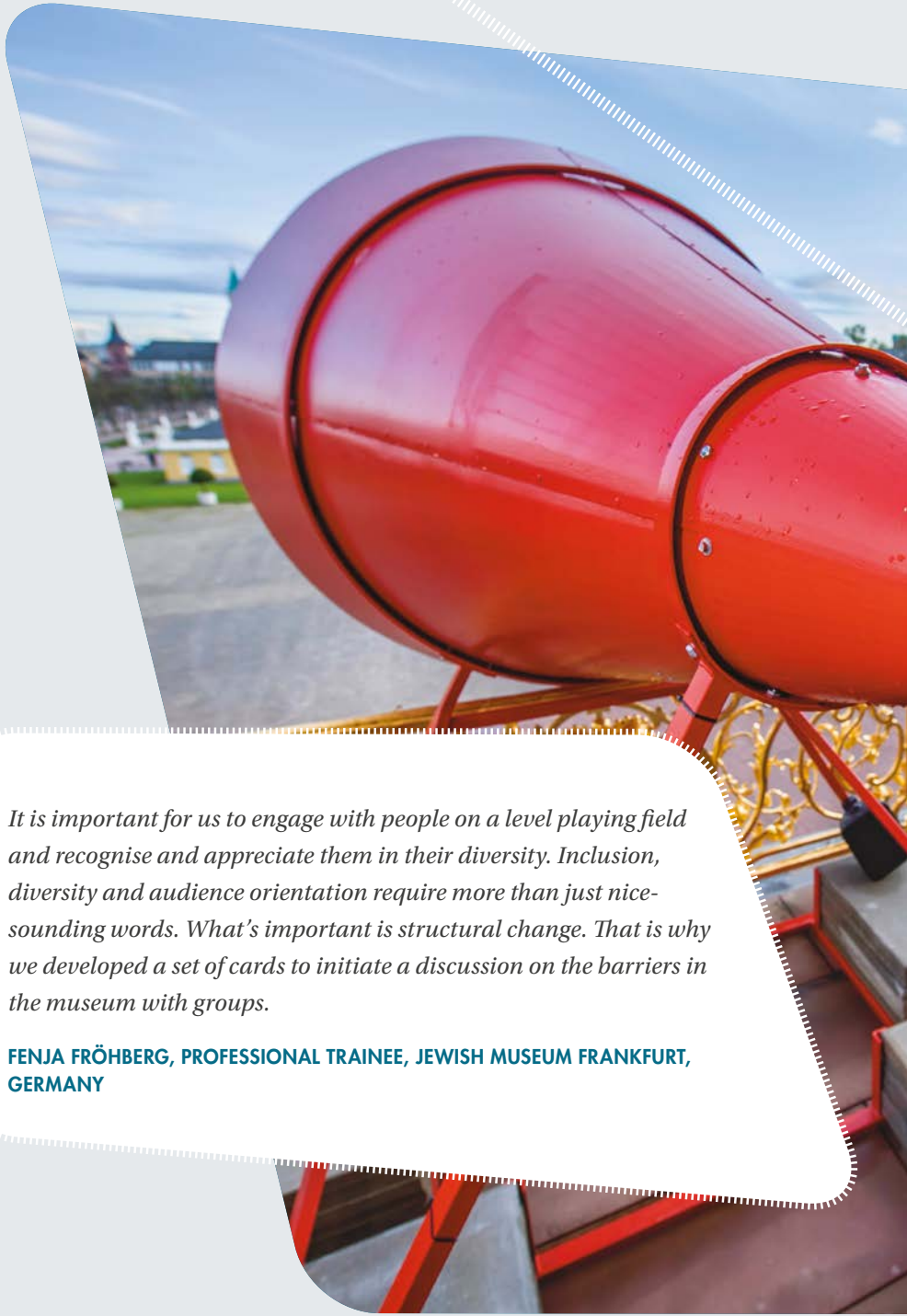
support of focus groups and engage in joint curatorial work with communities and young people. Participatory work requires effort from both sides, but the effort is definitely worth it and contributes to enhancing the museum's image as a place of vibrant encounter and negotiation. The degree of self-determination must be transparent to all involved parties. Furthermore, it is crucial that the museum assumes a respectful attitude and demonstrates an interest in learning.

## KNOWING THE AUDIENCE

Descriptions of target groups are often based on demographic categories, such as age, gender, ethnic background, education etc. However, it can be just as helpful - if not more - to know what people expect from a museum, in what situations they visit a museum, what interests they bring with them, but also why they decide not to visit a museum. Learning theories and visitor typology models can provide valuable insights in this regard. That said, it is important to use such aids with discretion so as to avoid reinforcing prejudices and stereotypes.

Understanding the various needs of the audience and responding to them sensitively can benefit all departments of a museum, for example, when developing exhibitions, organising events and brainstorming marketing measures. Museum staff can only work together properly if everyone has a clear idea of who they wish to reach or address and with what means. It is especially important to provide appropriate visitor services which continually adjust to the needs of the audience. In addition to family orientation and matters of accessibility and infrastructure, visitor services provide the audience with information and online services.



A large, red, cylindrical structure, possibly a telescope or a decorative element, is mounted on a rooftop terrace. The structure is made of metal and has a glossy finish. In the background, a cityscape with buildings and a church spire is visible under a blue sky with light clouds. The terrace has a metal railing and some concrete blocks.

*It is important for us to engage with people on a level playing field and recognise and appreciate them in their diversity. Inclusion, diversity and audience orientation require more than just nice-sounding words. What's important is structural change. That is why we developed a set of cards to initiate a discussion on the barriers in the museum with groups.*

**FENJA FRÖHBERG, PROFESSIONAL TRAINEE, JEWISH MUSEUM FRANKFURT, GERMANY**



## AUDIENCE RESEARCH AND EVALUATION

The more a museum knows about its visitors and users, the better it can tailor its work and activities. Audience research provides helpful insights in this respect. By focusing on non-visitors, a museum creates a solid basis for addressing a broader audience in the future in the sense of audience development. The evaluation also benefits from analyses of the users' (social) background, representative surveys and market research tools. Educational research, on the other hand, focuses more on perception and learning processes and can provide key information about whether and to what extent the intended goals have been achieved. All of these approaches should also extend to users in the digital sphere.



### WHAT DO VISITORS BRING WITH THEM?

*curiosity, interest, knowledge, expertise, special needs, experiences, cognitive / physical / social / emotional prerequisites...*

### WHAT DO VISITORS EXPECT?

*pleasure, entertainment, experience, new ideas, social interactions, activities, recreation, knowledge acquisition, fun, orientation, self-determination, participation...*

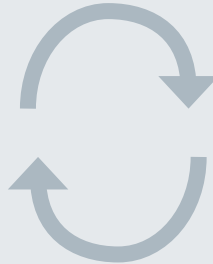


### WHAT ARE THE GOALS OF THE MUSEUM?

*participation, inclusion, diversity, museum outreach, relevance, self-determination, collaboration, providing information, developing competence...*

### WHAT DOES THE MUSEUM NEED TO ACHIEVE THIS?

*structures of a learning institution, audience research, self-image as a place of learning, professional expertise, outreach and "inreach" measures...*





## Audience orientation as an ongoing process

There are numerous ways to obtain quick and direct feedback on exhibitions, programmes and digital offers, and to present it transparently to the entire team. These include guestbooks, user comment functions and questionnaires on social media channels. Regular contact with visitors and the occasional conversation with on-duty employees and ticket counter staff about their experiences also support the museum's ongoing quality assurance measures. Additionally, the systematic evaluation of programmes and services can generate valuable insights into the audience and its satisfaction. Depending on the available resources and respective objectives, museums might also want to focus on concrete issues or carry out larger-scale research projects, e.g. in cooperation with universities.



### KEY QUESTIONS FOR PRACTICAL APPLICATION

- ▶ Who do we want to reach?
- ▶ Who are we deliberately or unconsciously excluding?
- ▶ Who are we reaching with our programmes, and who aren't we?
- ▶ What are the needs and specific characteristics of our visitors and users for or with whom we are planning a programme / event?
- ▶ To what extent does the audience have the possibility to actively participate?
- ▶ How can we open ourselves to audience feedback?





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**OBJECT-RELATED FOCUS.**  
**WORKING WITH COLLECTIONS**  
**AND EXHIBITIONS**

**SUMMARY**

An important factor in successful education and public engagement work is its focus on the museum's objects, collections and exhibitions. The work with objects and topics takes place in various contexts, e.g. in workshops, digital programmes and exhibitions. This creates the opportunity to involve the audience in the development and future design of these offers at an early stage. The focus of education and public engagement practice can also include exploring the museum as a system or addressing the questions of the visitors. Jointly defined goals within the museum provide an important frame of orientation. These serve to ensure that education and public engagement work fulfils certain functions which are closely interconnected, e.g. entertainment, enjoyment, learning, comprehension and critical examination.

Education and public engagement work promotes and shapes dialogue between the museum and the audience in digital and analogue environments. This includes encounters between the visitors and users themselves. The exploration of socially relevant topics based on selected objects and collections serves as the basis of this work. These objects and collections are examined in greater depth in exhibitions or viewable storage rooms, as well as more flexibly defined formats and in digital space. In so doing, education and public engagement activities reveal relationships, pose questions, provoke, stimulate and open new horizons to the audience. They can also help the entire museum to learn from the audience, become more open to their expectations, expertise and contributions, and incorporate them in the design and development of the museum's programmes and exhibitions.

## **PRINCIPLES OF WORKING WITH OBJECTS**

The following principles present a frame of orientation for working with objects, for which specific expertise is required:

▶ **object-appropriate and collection-specific**

Objects require and enable ways to understand them which take their characteristics into account. This entails handling them in a conservatorially appropriate or ethical manner and developing custom-made methods for studying them. The themes arise from the objects and collections themselves and relate to the audience and / or can be developed in cooperation with the audience.

▶ **multi-perspective and interdisciplinary**

Every object can be studied and interpreted on the basis of various criteria and from the point of view of multiple disciplines and interests. This offers the audience different ways to understand the objects and draw on their past experience, knowledge and emotions. Interconnecting perspectives and disciplines can encourage the audience to adopt new viewpoints or motivate them to explore the objects and themes in greater depth.

▶ **contemporary and real-world relevant**

Education and public engagement work is oriented around scientific and museological principles. It interweaves these with questions that are relevant to the present and the everyday reality of the audience. In so doing, museums can draw parallels to contemporary issues or focus on relevant aspects for certain target groups.

▶ **enlightening and activating**

Using objects and various methods like explanations or comparisons, education and public engagement activities can shed light on content and relationships. Activating visitors aims to increase their attention, promote competence, entertain, and encourage them to ask questions and engage in critical thinking.

▶ **transparent**

Education and public engagement work reveals how the museum functions as an institution. This kind of transparency promotes trust in the institution and is the basis for audience participation. Education and public engagement work helps, for example, visitors understand that the presentation of objects and content always represents a curated selection. Furthermore, it can shed light on the origin stories of collections, as well as the principles of collecting and researching.



## The principles of working with objects: Practical examples

PRINCIPLES	EXAMPLES
<b>object-appropriate and collection-specific</b>	<ul style="list-style-type: none"><li>▶ educational projects on museum conservatorial activities</li><li>▶ formats that focus on collection and provenance history</li><li>▶ possibilities for using and researching with the digital catalogue</li><li>▶ demonstration of historical devices / machines</li><li>▶ tactile installations in the exhibition</li></ul>
<b>multi-perspective and interdisciplinary</b>	<ul style="list-style-type: none"><li>▶ interviews with contemporary witnesses</li><li>▶ presentation of controversial research opinions in an exhibition</li><li>▶ approaches for learning through research</li><li>▶ multifaceted contextualisation of objects</li></ul>
<b>contemporary and real-world relevance</b>	<ul style="list-style-type: none"><li>▶ conceptual development with a citizen advisory council</li><li>▶ approaches for self-regulated learning in educational projects</li><li>▶ generating exhibition topics based on current social debates</li><li>▶ virtual exhibitions with content developed by the audience</li></ul>
<b>enlightening and activating</b>	<ul style="list-style-type: none"><li>▶ analogue and digital workshop activities (e.g. handicraft techniques, product design)</li><li>▶ hands-on projects</li><li>▶ playful approaches</li><li>▶ discussion forums</li><li>▶ places of experience (e.g. through scenography, immersion)</li></ul>
<b>transparent</b>	<ul style="list-style-type: none"><li>▶ cabinet exhibition on the museum's history</li><li>▶ educational projects on work performed at museums</li><li>▶ giving a voice to staff / visitors in an exhibition</li></ul>

## DEVELOPING EXHIBITIONS

The setting – in other words, the development and design of exhibitions – fundamentally determines how different people perceive the presented content and objects. Various factors play a role in this, e.g. the arrangements of the objects, their contextualisation and supplementary materials and media. The team defines for whom the exhibition is primarily intended in advance. The exhibition team then decides what education and public engagement goals are to be the focus in each section of the exhibition. As visitors engage with the objects, the primary focus and intended effect can refer, for example, to knowledge, skills, enjoyment, creativity, values and attitudes. Digital components can also represent an important element of exhibitions. They e.g. enable visitors to individually engage with the objects and content, offer new spaces of experience, and make the exhibition accessible through social media and the internet. With regard to all of these processes, we recommend getting the audience involved at an early stage. It is also important to consider aspects of accessibility and inclusion; especially in historic buildings, measures to facilitate greater accessibility may require extensive discussions and readiness to compromise.



The specific requirements and professional expertise of education and public engagement are important elements in the development and implementation of exhibitions. This applies, in particular, to the:

▶ **conception of content**

With the intended audience and education goals in mind, the team defines the content, clear messaging and narrative structure of the exhibition. It takes the latest scientific findings into account and considers current social issues and critical discourse.

▶ **dramaturgy**

A dramaturgically varied sequence in the exhibition heightens visitor attention and promotes insight and learning. To this end, the team should consider thematic-cognitive, sensory-perceptive and entertaining-activating levels of engagement.

▶ **architecture and design**

Physical, thematic, sensory and emotional accessibility all influence how the audience perceives an exhibition. An essential aspect is also the extent to which the exhibition architecture and design take the needs of the individual visitors and groups into account and offer them thematic and spatial orientation.

▶ **media, activating and participative elements**

The use of analogue and digital media, along with activating and participative elements are closely interconnected with the content and education goals. The development and implementation of media, media design and (info)graphics are informed by perceptual and attentional research findings.





*We place the same demands on digital education programmes as we do on analogue formats, for example, in terms of accessibility and participation. For us, digital cultural education is an intersectional task and must be a part of a (digital) comprehensive strategy that goes hand in hand with the museums' outreach efforts to society.*

**DR FOLKER METZGER, EDUCATION ADVISOR, AND SOPHIA GRÖSCHKE,  
CULTURAL EDUCATOR, KLASSIK STIFTUNG WEIMAR, GERMANY**



## Developing exhibition concepts: Examples of fields of action

FIELDS OF ACTION	EXAMPLES
<b>Conception of content</b>	<ul style="list-style-type: none"><li>▶ development of core statements and educational aims</li><li>▶ hierarchically structured content: facilitating quick orientation (e.g. through key objects, spatial design) and deeper engagement (e.g. through more detailed information, supplementary media content)</li><li>▶ pedagogical principles (e.g. didactic reduction or structuring)</li></ul>
<b>Dramaturgy</b>	<ul style="list-style-type: none"><li>▶ formulation of a narrative</li><li>▶ interchanging thematic grounding and orientation with surprises and “eureka effects”</li><li>▶ variation in room and lighting design</li><li>▶ sequence of concentration and relaxation, activity and rest</li></ul>
<b>Architecture and design</b>	<ul style="list-style-type: none"><li>▶ emotionality and sensory stimulus</li><li>▶ wide clearance (for groups and wheelchair users)</li><li>▶ placement of objects / texts and visibility of displays in glass cases (for short and tall visitors and wheelchair users)</li><li>▶ contrasts and legibility of graphics</li><li>▶ places to sit which also permit visitors to view the objects</li><li>▶ two-sense rule (e.g. hearing and seeing, touching and hearing, ...)</li></ul>

## FIELDS OF ACTION

## EXAMPLES

### Media, activating and participative elements

- ▶ rules for exhibition texts with respect to visitor-oriented language
- ▶ definition of various types of texts and their functions (e.g. theme and room-based texts, object texts, quotes), categorised in terms of information hierarchy
- ▶ development of scripts for activating and participative content (e.g. hands-on elements, media stations, games)
- ▶ augmenting the scope of experience (e.g. apps which explore the theme beyond the exhibition)

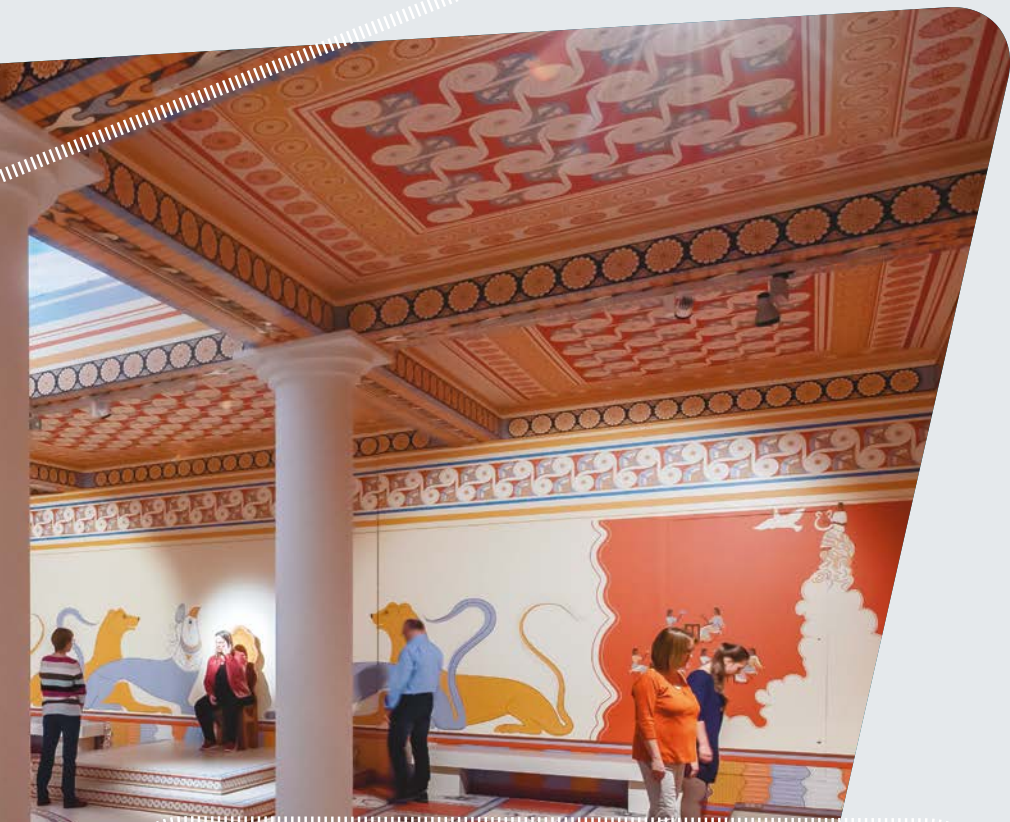


### KEY QUESTIONS FOR PRACTICAL APPLICATION

- ▶ What connections to the present and everyday life can be found in our collections and objects?
- ▶ In what form do we address current social discourse?
- ▶ What objectives do we hope to achieve with our exhibition?
- ▶ How are we getting the audience involved in the development stage of our programmes?
- ▶ How and with what methods are we making museum activities transparent to our audience?







*Highlighting the discursive connection between objects and society is one of the central tasks of public engagement at ethnological museums. We would like to provide visitors with a place for self-reflection and negotiation. The performative character of certain objects in our collections, our stories and presentations, tell us more about ourselves than about the “other”.*

**LÉONTINE MEIJER-VAN MENSCH, DIRECTOR, AND SABINE WOHLFARTH,  
RESPONSIBLE FOR EDUCATION AND PUBLIC ENGAGEMENT, ETHNOLOGICAL  
MUSEUMS IN LEIPZIG, HERRENHUT AND DRESDEN, GERMANY**





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# **MULTIFACETED METHODS AND FORMATS.**

**SHAPING THE INTERPLAY  
BETWEEN HUMANS,  
OBJECTS AND CONTENT**

SUMMARY

A key factor in successful education and public engagement involves selecting and implementing custom-made methods and formats. This approach helps raise and maintain the visitors' (and non-visitors') awareness of museum objects, exhibition themes and museum-related issues. Therefore, when choosing methods, we recommend considering the audience's varied interests, expectations, approaches and skills. The impact is further strengthened when visitors can draw on their own positions and contribute opinions, knowledge and subjects to the museum. The shape these take, i.e. whether the formats are staged inside or outside the museum, in analogue or digital form, is based on the education strategy. This in turn depends on the personnel and financial resources at the museum's disposal.

The first step for the team is to determine the relevant themes and strategies for the museum's education and public engagement. This entails analysing both the external and internal framework conditions (e.g. time, personnel and spatial resources), identifying the target groups and – based on these – developing education goals.





These factors influence which methods and formats are chosen and how they are designed. This requires some knowledge of various learning forms and theories, as well as a repertoire of methods and formats. It is possible to combine methods and formats in modular form.

## What aspects provide orientation when choosing methods and formats?

### BASIC GOALS

*entertainment, fun and pleasure,  
exchange and communication,  
participation and inclusion, activation,  
encounter, critical thinking,  
knowledge transfer etc.*

### PLACEMENT IN THE EDUCATION PROCESS

*for preparing / carrying out /  
following up a museum visit,  
as an introduction / as an exercise /  
for securing the results etc.*



### MULTIFACETED METHODS AND FORMATS

### SOCIAL CONTEXT

*in groups, in team, individually,  
oriented to media or persons etc.*

### TAKING DIFFERENT LEARNING STYLES INTO ACCOUNT

*auditive, haptic, motoric,  
communicative, visual etc.*

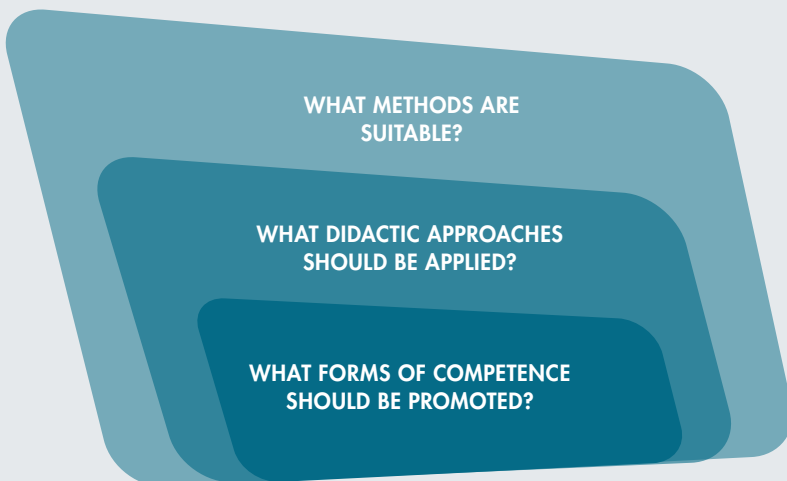


## **APPROACHES OF EDUCATION AND PUBLIC ENGAGEMENT**

The methods shape the process, or in other words, they influence how a programme or service is offered. To a large extent, they determine whether the participants or users respond to the offer in a receptive, participative, deconstructing, experience-based or insight-oriented manner. The format defines the external parameters, such as duration, target group and the model of communication (e.g. tour, workshop, project day, annual project etc.).

The approaches of education are either anchored in the didactics of the corresponding museum-based subject area or designed to be cross-disciplinary. For example, new perspectives can be highlighted by applying theatre-pedagogical methods in an open-air museum, language education in a transport museum, or a discussion series on sustainability in a design collection. Moreover, specific methods and formats can enhance the transparency of a museum's operations. Sensorial and playful methods, e.g. gamification, in education and public engagement work have the potential of attracting new visitor groups. Digital education and public engagement programmes, as well as outreach activities, are useful tools for expanding a museum's sphere of influence.

### **From defining goals to choosing methods – A competence-oriented model**



## Forms of competence, didactic approaches, methods: Examples

### WHAT FORMS OF COMPETENCE SHOULD BE PROMOTED?

- ▶ artistic-practical competence
- ▶ evaluative competence
- ▶ interrogative competence
- ▶ language competence
- ▶ media competence
- ▶ museum competence
- ▶ orientation competence
- ▶ perceptual competence
- ▶ personal competence
- ▶ social competence
- ▶ technical competence
- ▶ (trans-)cultural competence

### WHAT DIDACTIC APPROACHES SHOULD BE APPLIED?

- ▶ activity-oriented
- ▶ associative
- ▶ communicative
- ▶ dialogical
- ▶ discovery-based
- ▶ emotional
- ▶ entertaining
- ▶ participative
- ▶ playful
- ▶ questioning
- ▶ reflexive
- ▶ representative
- ▶ research-based
- ▶ sensory

### WHAT METHODS ARE SUITABLE (ANALOGUE AND DIGITAL)?

- ▶ aesthetic research
- ▶ chains of association
- ▶ Chinese basket
- ▶ comparison, analysis, interpretation
- ▶ debate formats
- ▶ drawing, sketching, visualising
- ▶ experimenting
- ▶ expert groups
- ▶ fishbowl
- ▶ focussed seeing
- ▶ games, puzzles
- ▶ image interpretation, image dictation
- ▶ interviews
- ▶ object factsheets
- ▶ photographing, making films
- ▶ re-enacting or making scenes come alive
- ▶ timeline
- ▶ working with source material



DER HERR MIT DEM SCHNAUZBART IST **HEINRICH SCHUBERT**.  
ER LIEBTE DIE SAGEN VON HOMER UND GLAUBTE, DASS IN DIESEN GESCHICHTEN  
MUSSEN. ALSO MACHTE ER SICH AUF NACH **MYKENE** UND SUCHTE NACH DEN HELLEN  
DABEI ENTDECKTE ER GRÄBER MIT VIELEN GOLDENEN BEIGABEN. DAS WAREN  
GEDACHT HATTE, ABER FÜR DIE FORSCHUNG TROTZDEM VON GROßER BE





*Everyone in my family – my husband, my son who’s an avid-reader, his playful little brother, and a museum-hating sister – all of us had lots of fun and were very interested in the exhibition. Each of us could view the objects at our own pace based on our personal interests, and play, listen, watch, so on and so forth – great!*

**VISITOR OF THE EXHIBITION “SIMPLY THEFT? THE BIZARRE WAYS OF KNOWLEDGE”, 2019. LWL-INDUSTRIEMUSEUM. WESTFÄLISCHES LANDESMUSEUM FÜR INDUSTRIEKULTUR, ZECHÉ ZOLLERN, DORTMUND, GERMANY**



## PERSONAL- AND MEDIA-BASED EDUCATION

The strength of personal-based education lies in its ability to act and react to the situation at hand. It facilitates direct communication between the visitors and the museum. It enriches the visitor experience and directly draws on the competence of the visitors. The quality of personal-based education inherently lies in the communication skills and subject-specific expertise of the respective staff members. In such cases, the staff apply monological, dialogical, moderating, action-oriented and participative forms of education.

Media-based education, on the other hand, offers access which the audience can use individually and instantaneously. It sparks initial interest and / or invites the user to engage in greater depth. It can meet a variety of needs, offer orientation and provide far-reaching opportunities for participation. Unlike personal-based education, media-based services – in both analogue and digital form – are usually characterised by a predefined concept when on-site interaction is not possible. Its quality strongly depends, therefore, on how well-detailed the anticipated usage scenarios are. Consequently, trials and analyses play a central role in the development of media-based education.



### KEY QUESTIONS FOR PRACTICAL APPLICATION

- ▶ What criteria do we use for developing and applying our methods? How can we engage with visitors in both an on-site and needs-oriented manner?
- ▶ How can our media and materials offer visitors more diverse means of access?
- ▶ How can we design our programmes to make them more accessible and inclusive?
- ▶ What forms of access do we provide in the digital sphere?
- ▶ Which formats can reach previously unreachable target groups?

## Examples of personal- and media-based education formats

### PERSONAL-BASED EDUCATION

#### IN THE MUSEUM

*use of guides / live speakers / explainers, open workshops, demonstrations, tours (also peer-to-peer and tandem tours), workshops in exhibitions, after-work events*

#### NON-SITE-SPECIFIC FORMATS, OUTSIDE THE MUSEUM

*outreach formats, museum busses, participation in events hosted by partners, city walks*

*instawalks, blended learning offers, supervised rallies, project days / weeks, holiday programmes, simulation games, interactive webinars, storytelling cafés*

#### IN THE MUSEUM

*texts, hands-on stations, games, media stations / media installations with photos / videos / audio recordings, augmented reality, virtual reality, accompanying booklets, activity sheets, quizzes, museum boxes / rucksacks, tour baskets, audio and multimedia guides for exhibitions, gaming apps*

#### NON-SITE-SPECIFIC FORMATS, OUTSIDE THE MUSEUM

*museum cases to borrow, pop-up exhibitions, digital learning games, tutorials, blogs, social media challenges, podcasts*

### MEDIA-BASED EDUCATION (ANALOGUE AND DIGITAL)









*Education is the language of museums. As we prepare for the reopening of the Lindenau Museum in 2024, we're rethinking all our formats and their many forms. We were so overwhelmed by the success of our first children's museum night, and we were able to welcome so many new visitors to our museum that we're definitely considering expanding this format.*

**JAQUELINE GLÜCK, ART EDUCATION / VISUAL ARTS STUDIO,  
LINDENAU-MUSEUM ALTENBURG, GERMANY**





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**NETWORKING.**  
**SEEKING PARTNERS AND**  
**WORKING TOGETHER**

SUMMARY

Networking and cooperation are important factors for successful education and public engagement. Partnerships mainly involve collaboration on concrete tasks and projects, while the goal of networking is to share expertise and learn from others' experience over the long term. Both forms of collaboration serve to increase the visibility of the museum and enable it to assume its societal responsibility. When museums regard themselves as learning institutions, they can reach new visitor groups and gain access to new perspectives. An essential prerequisite for cooperation and networking is to treat members and partners with respect and as equals.

Education and public engagement work benefits from collaboration with various partners. Moreover, such networks and partnerships provide important impulses for other museum departments, e.g. press and public relations, marketing and exhibition / collection activities.

The primary goals of networking and partnerships are:

▶ **greater reach and accessibility:**

It is not always easy for museums to reach potential visitors and expand their circle of users. To this end, it can be helpful to consult or team up with multipliers and key workers, such as social workers, teachers and geriatric caregivers.

▶ **more expertise:**

Networking provides education and public engagement staff an opportunity to tap outside expertise, generate knowledge and share their experience with external partners and experts.

▶ **more resources:**

In partnerships, the museum can share resources with its partners, e.g. personnel, know-how, rooms, materials and media, as well divide the resulting expenses. In this way, cooperation has a synergetic effect that benefits both sides.

► **more relevance:**

Networking education and public engagement can increase their reach and impact in society. Networking forges alliances and increases the visibility of their activities. Not only does this strengthen the role of education and public engagement in general, but also the standing of the entire museum.

The museum can become the host, a platform for networking and exchange. And when it collaborates with partners at external venues, an even greater reach can be achieved.

## FRAMEWORK CONDITIONS

The following factors contribute to making collaborations profitable for both sides:

► **maintaining long-term contacts:**

To foster mutual trust, regular and sustained communication with one's partners is necessary. To this end, contact partners on both sides are needed who are allocated enough time to develop clearly and mutually defined objectives.

► **recognising strengths and weaknesses:**

Before approaching potential partners, one should be aware of one's strengths and weaknesses. This can be done by carrying out a strength-weakness analysis which also takes the risks and chances of possible partnerships into account. This ensures that the partners are a "good fit" with respect to their own goals or respective project.

► **openness and ability to give / take criticism:**

Successful collaboration requires that all parties have a genuine interest in the others and their expertise. Collaboration offers the greatest value if everyone is willing to engage in self-reflection, promote transparency and venture in new directions.

► **added value for all participants:**

Partnerships work well if the participants are able to clearly define and communicate the added value of their joint collaboration for their own institution.







*I took part in the workshop “How does migration affect children?”. As a teacher of a preparatory class, I see how important it is to have empathy with people who haven’t been socialised here and don’t have the same starting conditions on their path through life in Germany. The TECHNOSEUM gave me a platform to share this.*

**MEITHE MORGENSTERN, HIGH SCHOOL TEACHER, PARTICIPANT IN A WORKSHOP TO PREPARE FOR THE EXHIBITION “WORK AND MIGRATION” AT THE TECHNOSEUM IN MANNHEIM, GERMANY**



## ORGANISATIONAL FORMS

Education and public engagement can take place in more strongly defined partnerships or in informal networks depending on the corresponding goals. In other words, collaboration can take place with individual persons, groups, organisations, associations or other institutions. Cooperation-based partnerships are characterised by clearly defined agreements or contracts, in which the respective partners stipulate their specific tasks, roles and responsibilities. These agreements lend the partnership a more binding character. Informal partnerships or networks are more flexible and open-ended in comparison and are not necessarily undergirded by written agreements. The staff members in the education and public engagement department maintain contact with regional, national and international colleagues and other stakeholders, and function as important agents themselves in cultural education funding programmes.



### KEY QUESTIONS FOR PRACTICAL APPLICATION

- ▶ How are we meeting our societal responsibility as a public institution by way of partnerships?
- ▶ What does the partnership mean to us? What does it mean to our partner(s)?
- ▶ Who plays what role in the partnership, and who is responsible for which tasks?
- ▶ How are the communication structures organised?
- ▶ How do we ensure all participants are made aware of the self-image and characteristics of their corresponding partners?



## Networking: Examples for cooperation partners

AREA	EXAMPLES
<b>Culture</b>	▶ museums, archives, libraries, theatres, orchestras, socio-cultural organisations, cultural media outlets
<b>Education</b>	▶ daycare centres, schools, adult education centres and other learning facilities, providers of digital education platforms and professional training seminars
<b>Social work</b>	▶ counselling centres, self-help groups, children and youth centres, disability associations, senior citizens homes, key workers
<b>Creative scene</b>	▶ maker spaces, digital artistic platforms, artists
<b>Science and research</b>	▶ universities and institutes
<b>Business</b>	▶ local, national and international companies and service providers
<b>Municipal and rural organisations</b>	▶ associations, citizens' initiatives, migrant-run organisations, neighbourhood organisations
<b>Recreational facilities</b>	▶ recreation parks, public swimming pools, cinemas, zoos
<b>Associations</b>	▶ regional and national organisations of museums and / or museum education, International Council of Museums (ICOM) with the International Committee for Education and Cultural Action (CECA), associations of cultural learning and education, Network of European Museum Organisations (NEMO) with the Working Group LEM - the Learning Museum



# Plattform

Gestalten, Umordnen

Plattformformen – Rearrange – Show

Arbeitsauftrag





*Longer-term partnerships strengthen a museum's image as a place of encounter. In order to fulfil our educative responsibilities, we are actively seeking partners in our area. To ensure good cooperation with outside groups, we need space and time for participation, greater say and self-representation.*

**CHRISTINE VAN HAAREN, HEAD OF EDUCATION AND OUTREACH,  
BERLINISCHE GALERIE, BERLIN, GERMANY**



## Networking: Examples of joint projects

	EDUCATION INSTITUTIONS	SOCIAL WORK
<b>Goal</b>	▶ optimise museum visits of school groups	▶ create an audio guide for people who are blind or visually impaired
<b>Partners</b>	▶ teachers	▶ local / regional association for people who are blind or visually impaired
<b>Format</b>	▶ working group	▶ project
<b>Result</b>	▶ didactic materials with curricular references, concept for personnel-based education measures, joint projects, continuing education seminars for teachers and mediators	▶ audio guide with audio description, tested on a target group
<b>Added value for the museum</b>	▶ relationship of trust between teaching staff and the museum team, needs-oriented programmes	▶ museum becomes acquainted with the visitors' needs, can offer concrete measures tailored to the target group and use the experience for future projects
<b>Added value for the partners</b>	▶ museum visit tailored to the teacher's instruction, reduces teachers' workload	▶ associations for people who are blind and visually impaired supports its members, enables members to participate in an attractive museum visit, and strengthens its relevance

## CULTURAL ORGANISATIONS

## RECREATIONAL FACILITIES

▶ attract new visitors

▶ develop an app to explore the city

▶ local / regional theatre and theatre association

▶ children's and youth centre

▶ intensive project work at first, then regular joint events

▶ project work with young people, e.g. holiday workshops or working group

▶ museum tours with actors

▶ playful / interactive exploration of the city

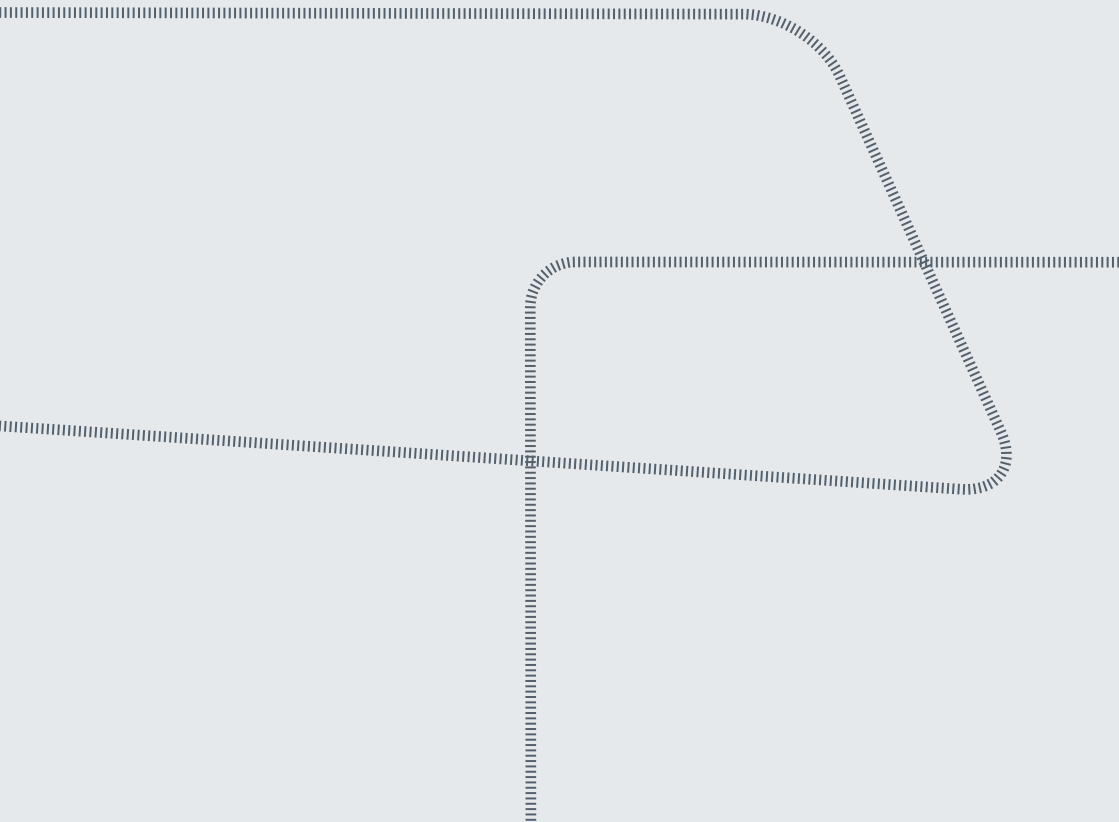
▶ museum learns theatre pedagogical methods and can integrate them in other educational programmes, reach new target groups

▶ museum becomes familiar with the perspectives of young people; helps attract new target groups

▶ theatre gains a new venue (the museum) and access to a new audience

▶ extends reach to new cultural sites, expands its own programme





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**PROCESSUALITY.**

**ONGOING REFLECTION AND  
FURTHER DEVELOPMENT**

SUMMARY

An important factor for successful education and public engagement is the willingness to constantly scrutinise one's positions, objectives and strategies. These are especially sustainable if the entire museum team adheres to them, collaboratively develops them, and allows the audience to be directly involved in how they are formulated. In this way, the whole museum constructively addresses the challenges and issues at hand, e.g. social changes. Such a process-based approach touches on the values and positions, structures and organisational forms of an institution and is oriented around the expectations, needs and wishes of a diverse audience.

Process-based work is necessary for transforming a museum into a learning institution. This requires a basic cooperative attitude, as well as an open and transparent communication culture. This entails being able to openly discuss successes and failures. To this end, the museum should establish the corresponding structures, e.g. clearly defined paths of communication, meeting structures and knowledge management. Education and public engagement work develops in an especially sustainable manner if it is prepared to embrace the audience in all its complexity and open itself to the opportunities of digital culture. Such outward-oriented work always gives rise to internal changes within the museum. To (further) develop and permanently anchor the corresponding areas of competence, it is important to offer advanced and professional training seminars on a regular basis.





*We want the museum to be a platform for discussions. A place where you can also talk loudly and have a conversation. I could imagine the museum as a meeting place where we'd want to meet up with our friends. As young people, we want to be treated seriously like all the other visitors.*

**NINA MONKADDAM AND ELA SU EMRE, PARTICIPANTS OF THE YOUTH LAB BERLIN, LAB.BODE, STAATLICHE MUSEEN ZU BERLIN, GERMANY**



## Processual work

### BASIC POSITION OF THE MUSEUM

#### Focus on

- ▶ the audience
- ▶ social changes
- ▶ scientific findings

#### Strive for

- ▶ transparency
- ▶ continued development
- ▶ self-reflection
- ▶ change- and process management

### FRAMEWORK CONDITIONS

- ▶ mission statement and attitude of the museum
- ▶ content and task of the museum
- ▶ requirements of the funding provider
- ▶ interests of the stakeholders
- ▶ values, norms, laws



# EDUCATION AND PUBLIC ENGAGEMENT IN THE MUSEUM

formulate educational goals  
and set priorities

develop strategies

choose instruments / formats, create working structures,  
designate (internal and external) participants

document and evaluate the measures

**the museum as a learning institution**

- ▶ qualification of staff
- ▶ further develop best practices and learn from mistakes



## DEFINING THE OBJECTIVES OF EDUCATION AND PUBLIC ENGAGEMENT WORK

Creating a model or educational concept provides orientation for developing realistic and feasible objectives and ensure sustainability. In the beginning, one need only to specify the most important key points which are to be developed further in small steps going forward. The education and public engagement work develops its objectives in coordination and collaboration with the museum's management team and staff. The clearer and more precisely formulated these goals are, the easier it is to prioritise, review and adjust them as needed. They help the museum decide which measures should be implemented from the plethora of possibilities. These can include, for example, reaching new target groups or channelling the knowledge of the audience into the museum.

The following aspects play a role in defining these objectives:

- ▶ audience orientation at the individual and social level (e.g. with regard to relevance, skill acquisition, empowerment, participation)
- ▶ size and orientation of the museum (research museum, technology museum, regional museum etc.), its mission (in accordance with the respective foundation law, establishment decree etc.) and regional anchoring
- ▶ profile of its collections and exhibitions in relation to scientific or social relevance
- ▶ resources (e.g. personnel, financial and spatial).



To ensure greater sustainability, the educational goals focus less on quantitative criteria, e.g. increasing visitor numbers, and more on the qualitative, e.g. the diversification of the audience. Important impulses can also come from outside the museum, for example, through:

- ▶ societal discourse, challenges and trends
- ▶ decisions and demands issued / expressed by policymakers
- ▶ expectations and requirements of the funding provider(s)
- ▶ wishes and reactions of stakeholders, sponsors and support associations
- ▶ expectations and needs of the audience

Substantiated knowledge of cultural and educational policies and funding opportunities, which also include such key themes as digitalisation and democratisation, play a significant role in the development of effective strategies. This includes knowledge of:

- ▶ teaching and educational plans in place at daycare facilities and schools
- ▶ municipal and regional cultural development plans
- ▶ respective state and federal frameworks for future cultural and educational policy
- ▶ guidelines or agreements at the municipal, regional, national and international levels (e.g. UN 2030 Agenda for Sustainable Development and the UN Convention on the Rights of Persons with Disabilities of 2008)
- ▶ funding programmes.



## **DEVELOPING STRATEGIES AND INSTRUMENTS**

The next step is to lay out the basic paths for achieving these goals. The chosen strategy defines the instruments, formats, methods and partners to be used, as well as the scopes of responsibilities, working structures and procedures. This step requires the willingness and courage to test new approaches and venture down unconventional paths. Often one can learn more from reflecting on one's mistakes than from one's successes.

Before the concrete implementation phase begins, one should carefully consider the impact of the developed mediation strategies, not least of all out of responsibility toward the audience: Do the strategies and instruments correspond with the given objectives? If the process has not yet been participative, i.e. involved the participation of focus groups, it would be a good idea at this point to conduct meetings with (potential) visitors, multipliers and / or experts on the suitability of the measures.

## **DOCUMENTING, EVALUATING, IMPLEMENTING**

We recommend documenting the individual steps when conducting projects, programmes and processes. This ensures greater transparency and provides a basis for reflection.

The key information includes:

- ▶ concept and content
- ▶ communication structures
- ▶ audience orientation
- ▶ resource allocation
- ▶ methods and formats
- ▶ results









*Even when doing processual work, quality should be an issue. It comes with curatorial organisation (for harmonising heterogenous elements), cultural formatting (for successful interpersonal encounter) and critical reflection on one's actions and affirmation of one's role.*

**KENNETH ANDERS, DIRECTOR, ODERBRUCH MUSEUM ALTRANFT  
– WORKSHOP FOR RURAL CULTURE, GERMANY**



A critical analysis or evaluation of this information creates the basis for quality assurance and development. Less effective education and public engagement work is improved or discontinued, and successful ones further developed. Assuming, of course, that the results of the evaluations are implemented. In the process, staff should consider what levels their activities should focus on, and whether the instruments, strategies, educational goals or the basic approach of the museum require reassessment or strengthening.



#### **KEY QUESTIONS FOR PRACTICAL APPLICATION**

- ▶ How do we encourage continued willingness to embrace change and shape open processes in our team?
- ▶ How do we create and promote open communication in our museum and a working environment where mistakes and failures are allowed?
- ▶ Are our strategies and instruments suited for achieving the desired goal(s)?
- ▶ Are the proposed goals feasible or do they have to be redefined? What goals are non-negotiable?
- ▶ In what form do we integrate the results of our evaluations and feedback into the ongoing process and other plans?



*As public places, museums should no longer be allowed to decide whether they want to explore topics like diversity or discrimination. It should be obligatory for all departments. Each museum should be able to present a plan, for example, explaining how it is working to do this, and I should be able to recognise it during my visit to the museum.*

**MIRIAM CAMARA, VISITOR AND ORGANISATIONAL DEVELOPER, GERMANY**



## Processuality: Practical examples

### Goal

- ▶ attract adult non-visitors
- ▶ highlight migration as a current issue

### Strategy

- ▶ increase event character
- ▶ create new, surprising perspectives on the objects

### Format

- ▶ pub quiz
- ▶ intervention in the existing exhibition

### Documentation

- ▶ visitor numbers and parameters
- ▶ visitor numbers and the duration of time they engaged with the interventions

### Evaluation


- ▶ feedback forms, interviews
- ▶ participative observation, interviews, feedback cards

### Findings and consequences

- ▶ a) Format was successful: What worked well and what can be improved?

How can successful methods be utilised in other programmes?

- ▶ b) Format was mediocre: What factors can be changed (duration, methods, date, costs, advertisement)? Follow up with another evaluation.

- 
- ▶ intensify digital education
  - ▶ create target group-specific measures
  - ▶ serious game on website
  - ▶ user numbers and duration of play
  - ▶ online questionnaire
  - ▶ promote historical understanding
  - ▶ connect scientific work with references to the visitors' living environment
  - ▶ school project with an artistic learning-through-research approach
  - ▶ participant portfolios and photo documentation
  - ▶ questionnaire

- ▶ c) Format was (mostly) unsuccessful: What factors were mainly responsible for the lack of success? If necessary, decide on new instrument or develop new strategy.

Final consequence: If the measure outstrips the available resources, one must reassess or redefine the goal. Determine which goals are non-negotiable.





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