Capturing collections knowledge

Most museums have hidden collections knowledge. Some of it is in inaccessible records, but much of it is in people’s heads. If museums could uncover, record and share all this unrecorded collections knowledge, it would enrich the experience of all their users and save time and effort for other people working at the museum, now and in the future.

If you want to start capturing your own collections knowledge or that of your colleagues more effectively, these simple techniques may help.

Work with successors

The Museums Association has been piloting an approach that gives retired collections specialists the opportunity to spend time passing on knowledge to their successors, the Monument Fellowships. Not everyone can expect to have this kind of funded opportunity, but we hope that more and more museums will find ways to enable specialists who have retired or left to work directly with their successor to pass on their unrecorded knowledge.

There is more advice for people thinking of setting up this kind of programme in the Monument Fellowships section of the website. Some key points are:

- Draw up a simple agreement, including a workplan, at the outset and stick to it. Include an agreement for how many hours everyone involved will commit to the project. One of the most common pitfalls with the Monument Fellowships has been successors being unable to ring-fence enough time to spend with the Fellow.
- Decide what the scope of your relationship is: will you only talk about collections knowledge, or about other organisational matters? Agree this at the very beginning. Remember, talking about organisational history can quickly lead you into organisational politics.
- Check your learning style and your successor’s and make sure you use approaches that suit you both.
- Think about how you want to work. You could plan to spend an hour each week for a few months talking and looking at collections together. Or you could plan for the retired specialist to spend time working in the same office as you, perhaps producing a written resource, maximising the opportunity for informal contact.

Improve Documentation

Improving documentation is an obvious and cost-effective approach to capturing collections knowledge. It may be the only option open to you if you have no colleagues to share information with, and no possibility of working alongside a successor: perhaps your post is not being filled for the foreseeable future. It should also form part of all the other approaches: there
is no point transferring knowledge from your head to your successor’s head if that is where it stays.

- Prioritise: you may not be able to cover the whole collection. You might choose to focus on what you consider to be the most important areas of the collection. But conversely, it could be more productive to focus on less well-known areas of the collection that have not been the subject of exhibitions or publications. Think about whether there are areas of your expertise that a successor is unlikely to share: perhaps an obscure personal interest, where expertise is thin on the ground.
- Think about what things you know but have never written down. Imagine you had a visitor in the store with you and you were talking to them about an object. Are the things you would choose to tell them included in the object’s records? If not, this is what you need to work on. Now imagine you were talking about the object to a new colleague. Are there different things you need to tell them?
- At its simplest, this might mean filling in factual gaps in the recorded information about an object.
- Thinking beyond the factual, it might include more subjective, personal information. Perhaps an evaluation of an object’s importance, answering the questions: “Why did we collect this? What is significant about this? Just why should we keep this?”
- It might include practical advice, where expertise meets collections management. For example, Anthea Jarvis, a Monument Fellow working at the Gallery of Costume, Manchester prepared a manual which included information on how to mount dress for display as well as how to date dress in 19th and 20th century photographs.
- Make sure whatever you have written down will stay accessible, working with colleagues to ensure it is linked to collections management and other systems.
- If you know about any inaccessible or obscure sources of collections knowledge, make sure you document their existence even if you don’t have time to transfer their contents into your main records. For example, if your museum has a collection of old exhibition labels in a corner of a store make sure your successors and colleagues know about their importance.

**Interview experts**

This technique needs more careful planning than some of the other approaches suggested here and does require skill on the part of the interviewer. However it can be a very effective way of capturing the kinds of richer, more contextual knowledge that other methods might miss. It is also useful if the specialist you want to work with is short of time, very elderly or ill, or perhaps hopelessly unsystematic.

- Choose your interviewer carefully. If this approach is to be as effective as possible, the interviewer needs to be skilled in order to tease out the most valuable information. Making tacit knowledge explicit can be difficult – people often don’t ‘know what they know’ and so helping
people to talk about what they know, and then capturing that effectively, is a key skill.

- In an ideal world you might hire an external consultant, or develop and train someone in-house. But if you have no budget for that, try to choose someone with strong communication and interpersonal skills. Imagine you were recruiting to a new post in your department: who might you choose to join you on the interview panel? That individual might make a good interviewer in this situation.

- The best way to capture tacit knowledge is using one-to-one, face-to-face interviews with your experts. The interviews will involve asking them to talk about what they do and to describe specific situations in which they have applied specific expertise. Interviews need to be well prepared in advance, including drafting a topic guide or a list of questions.

- Decide what kind of knowledge you want to capture. Interviews might cover factual information about objects or less tangible knowledge about processes or practice (see Improve Documentation above for more suggestions).

- If you are looking for an understanding of the judgements someone else has made (“why did you think this object was important enough to purchase for the collection”, “why did you choose this part of the collection as the subject for an exhibition”), you may need to reassure your interviewee at the outset that you are not questioning or challenging their judgement. Your interviewee should never feel defensive or undermined. Your aim is not to scrutinise their decision-making, but to understand tacit processes of judgement better.

- Uncovering information about processes can be harder than recording factual information. If that is what you are trying to do, you might use questions such as:
  - Describe a time when…
  - What’s the first thing you do?
  - How do you know to do that?
  - What do you do next? Why?
  - What would happen if…?
  - Who else is involved?
  - What are some common mistakes or misconceptions?
  - What is the most important thing to remember when you’re doing this?
  - What are the main obstacles that prevent someone untrained or inexperienced from achieving the same results as you?

- In order to effectively capture the responses, you will need either a tape recorder or a second person to transcribe the interview. Make sure you record the information in an accessible form.

- If the interviewer is not the end user of the information, you will need to involve the end user in reviewing the transcripts, to make sure they understand the information communicated and that it covers their areas of interest.

- Some practitioners recommend a process in which the harvester conducts initial interviews with experts, and then presents the results to a group representing the eventual users of that knowledge. Any
gaps in what the users need to know, or in their understanding of what has been captured, can then be used to form the basis of a second round of expert interviewing. This process of cycling between experts and eventual users can be invaluable in ensuring a fit between what is needed and what is being captured.

Communities of Practice

A community of practice is a group of people who share an enthusiasm for something they do and learn how to do it better as they interact regularly. In the museum sector, we have a large number of formal or semi-formal organisations for sharing knowledge, such as subject specialist networks. However, a community of practice is often something much less formal and resource-intensive. You may have a community of practice without even realising it – the long-serving colleague you ask for information about former approaches to documentation, the ex-colleague you email to ask their advice about a subject area they know well.

Communities of knowledge can be particularly useful in helping with the kind of knowledge that is rarely written down. They should also be the kind of place where you can admit things you don’t know without feeling foolish.

To promote the sharing of collections knowledge, you could think of ways of making better use of communities of practice. While retaining the essential informality of this approach, think about whether there are opportunities to record or share knowledge through a community of practice.

- Think about how you share your information resources. Are there other museums who would gain from access to collections knowledge you hold? If you are planning to capture unrecorded collections knowledge, can you approach the project in a way that will be useful to others as well as to your own museum?
- Are there other museums that might have information resources that could be valuable for your museum? Have you asked them if you can see them?

Run workshops/masterclasses

This approach has been at the heart of the Monument Fellowships, and there is advice available on how to run a masterclass on the Monument section of the website.

Storytelling

Whatever approach to knowledge transfer you use, you may wish to incorporate elements of story-telling. Experts on knowledge transfer suggest that stories – or anecdotes – based on personal experience can help bring knowledge to life, make information more memorable and make sense of situations you are describing.
Telling stories complements more abstract and analytical approaches to sharing knowledge. Storytelling has an emotional content. It can be very vivid and helps to build trust. Storytelling is not about amassing evidence of something happening over and over again; it is about telling someone about one particular event or occurrence with enough detail and emotional engagement to convey a point powerfully.

Good stories have five key characteristics:

- **Endurance**: the stories go on through decades.
- **Salience**: they have punch and emotional power.
- **Sense-making**: they explain something.
- **Comfort**: the story resonates with something people have experienced.
- **Authenticity**: people trust the storyteller and believe the story.

Museums are full of good stories. Make sure you incorporate some when you are working on collections knowledge with colleagues.

*This advice sheet was written by Helen Wilkinson, and draws on suggestions made by Andrew Forrest of the Cass Business School.*