

A LAUNCH GUIDE FOR MUSEUMS

*the distance
learning
workbook*

Emily Kotecki



contents

Introduction	3
Building Blocks	4
Identifying Your Target Audience & Their Needs	4
Identifying Your Learning Goals	7
Identifying Your Stakeholders	10
Identifying Your Technology	12
Distance Learning Types	14
Additional Resources	18
About the Author	19

welcome!

This workbook is an interactive guide for any museum wanting to start a distance learning program but asking, “Where do I begin?” Once you read through these pages and complete the activities, you’ll have a map showing where you want to go and how to get there.

Distance learning is a part of a digital learning ecosystem which includes augmented reality, virtual reality, apps, kiosks, immersive rooms, etc. While many forms of digital learning can happen in the galleries, distance learning happens outside of the physical museum. It can include

synchronous content, which is consumed live, and asynchronous content, which is consumed on demand. We’ll explore specific types of distance learning later on.

After COVID-19 shut down museums worldwide, many institutions rapidly turned to distance learning to connect with their audiences.

They had to act fast, but now is an opportunity to slow down and take a collective breath. We can build programs that aren’t just a stop-gap measure but rather strategically integrated into the fabric of our institutions.

Too often, museums center their distance learning programs around technology rather than users, creating programs in a vacuum without internal or external guidance. While these may seem like obvious traps, they are surprisingly easy to fall into. I created this workbook to help you avoid them.

This workbook is divided into two sections. The first section, **Building Blocks**, has four subsections that examine the foundational components of any distance learning program:

1. Identifying Your Target Audience and Their Needs
2. Identifying Your Learning Goals
3. Identifying Your Stakeholders
4. Identifying Your Technology

Each subsection includes an introduction followed by questions or activities for you to explore at your museum. I’ve presented these topics in an intentional order so that you begin by centering the user. However, the real world isn’t always that orderly or neat. While these topics are distinct, they also overlap. You might start at one activity, skip a section, then circle back later. That’s okay! For you to feel empowered, you need to make decisions that work best for your museum.

The second section, **Distance Learning Types**, dives into three types of distance learning, laying out the pros, cons, and best practices. The first section of the workbook helps you define your museum’s goals and the second section presents a menu of distance learning platforms to best achieve those goals.

I’ve been creating distance learning programs for museums for ten years. I started by helping the North Carolina Museum of Art (NCMA) launch a first-of-its-kind set of online courses for high school students. Over the years, the program expanded to offer more types of distance learning for different audiences. Since then, I’ve consulted museums from around the country on the strategic plans and content of their new distance learning programs.

I’m excited to share my experience so that any museum, big or small, can feel empowered to use distance learning. Together, we’ll begin this journey one step, and one building block, at a time.

Let’s go!

Emily

Any museum, big or small, can feel empowered to use distance learning.

building blocks

Identifying Your Target Audience & Their Needs

How do you know who to create a distance learning program for? There are many ways to answer that question. For example, a large museum in London moved to online courses after COVID-19 shut down their traditional, in-person adult lecture series. When I worked at the NCMA, we had a gap in our programming for high school students. We wanted to create a pipeline of programming so we could cultivate lifelong learners. Plus, as the state art museum, we wanted to not only invest in this new audience but reach them everywhere in North Carolina. We created online courses for high school students. So, it might be a necessity. It might be a gap in programming. It might be an extension of what you're doing onsite.

Once you know who you want to reach, understanding them is one of the most important steps in designing a distance learning program. Each audience has different interests, needs, and motivations for what and how they want to engage with the museum. Taking time to understand and center those interests will help you create a more relevant program.

Why is relevance key? As Nina Simon wrote in her book, *The Art of Relevance*:¹

Relevance is a paradox. It is essential; it gets people to pay attention, to walk in the door, to open their hearts. But it is also meaningless without powerful programming on the other side of the door. If the door doesn't lead to valuable offerings, if nothing touches peoples' hearts, interest fades.

A distance learning program that is centered on audience interests makes it meaningful. It opens the door to deeper engagement. It invites audiences in, from wherever they may be.

¹Simon, Nina. *Art of Relevance*. Museum 2.0. 2016.

Audience Needs Discussion Questions

Now it's your turn! In the following questions, you'll begin to identify and understand your target audience.

WHO is your audience?

What audience do you want to reach?

What prior knowledge do you have about this audience?

What motivates them to engage with a museum?

WHY do you want to create a distance learning program for that audience?

What need is it meeting for your department/museum?

What need is it meeting for your target audience?

What other, similar programs currently exist for that audience?

WHAT do you think the specific needs are for this audience? Do they need professional development credit?

Are they a homeschool group looking for enrichment? Are they teens wanting to connect with others?

HOW will you learn more about your audience so you can better empathize with them?

A survey? Focus groups? Create an advisory council?

K-W-L Chart

A K-W-L Chart can be a helpful way to better understand your audience's needs and interests.

What do you *know* about your audience?

List all the needs, interests, and motivations that you *know* about your audience.

What do you *want to know* about your audience?

List all the questions you *want to know* about this audience.

(You can tweak the questions for a survey or focus group to collect answers.)

What did you *learn* about your audience?

Write the answers you recorded and other new insights that you *learned* from that audience research.

Identifying Your Learning Goals

Once you know which audience you want to reach, learning goals become the guiding stars of program development. Learning goals—objectives or outcomes—keep your team, program, and content focused. They will determine how you write your content, which objects you choose, and how you evaluate your program.

In the previous subsection, you learned that audience research centers the user. Now, we'll think about how learning goals centers the museum. While you're making the program for the audience, it must also align with the collection and goals of your museum. Hilda Hein, a professor of philosophy at the College of the Holy Cross who focuses on museums and women studies, wrote that "to be 'people-centered' is not to deny a pivotal place to objects, nor to minimize their value, but, rather, to acknowledge that their meaning, whose interpretation was previously held to be province of 'experts,' is now equally accessible."²

The process of creating learning goals is a balancing act. It requires taking multiple perspectives into consideration and translating those needs into specific, achievable, and measurable goals. It is an opportunity to invite both internal and external stakeholders (we'll define those in the next subsection) into the conversation.

The process is also cyclical. You create goals, use them to develop your program, then test whether you met those goals, and refine them in order to improve your program. Just as you want the program to be relevant to your audience, it's imperative it is also relevant to your museum.

²Hein, Hilda S. "The Matter of Museums." *Journal of Museum Education*, vol. 36, no. 2, 2011, pp. 179–188.

Sticky Note

Brainstorming Activity

In the following sticky note activity, you will begin to develop your learning goals. Check out the next page to see an example!

1. Create a sticky note for each of the following categories:
 - Skills
 - Attitudes/Feelings
 - Behaviors
 - Knowledge/Understandings
2. Under each category—and based on what you know about your target audience—answer the following: what [category] do you want [your audience] to gain/develop/learn? For example, What skills do you want teachers to develop?
3. As you write down answers, keep one answer per sticky note and place it under that category.
4. Once you've done this for all of the categories, take a look at your answers in each category and reflect on what you wrote.

Are there emerging themes in the answers that come up repeatedly? That's a sign of importance!

Are there answers that don't feel as important anymore? Are there some categories that don't get as many answers? That's a sign that you can remove it from your list.

Your program doesn't (and shouldn't) have to do everything, so this exercise can help eliminate learning goals that aren't as important to your program. There's no "right" number of learning goals. The right number is the one that works best for your program.

Is there a whole new category that emerged? That's okay! The learning goals should be relevant to your audience and your museum.

Using sticky notes makes it easy to visualize your thoughts, move answers around, identify trends, and remove ideas.

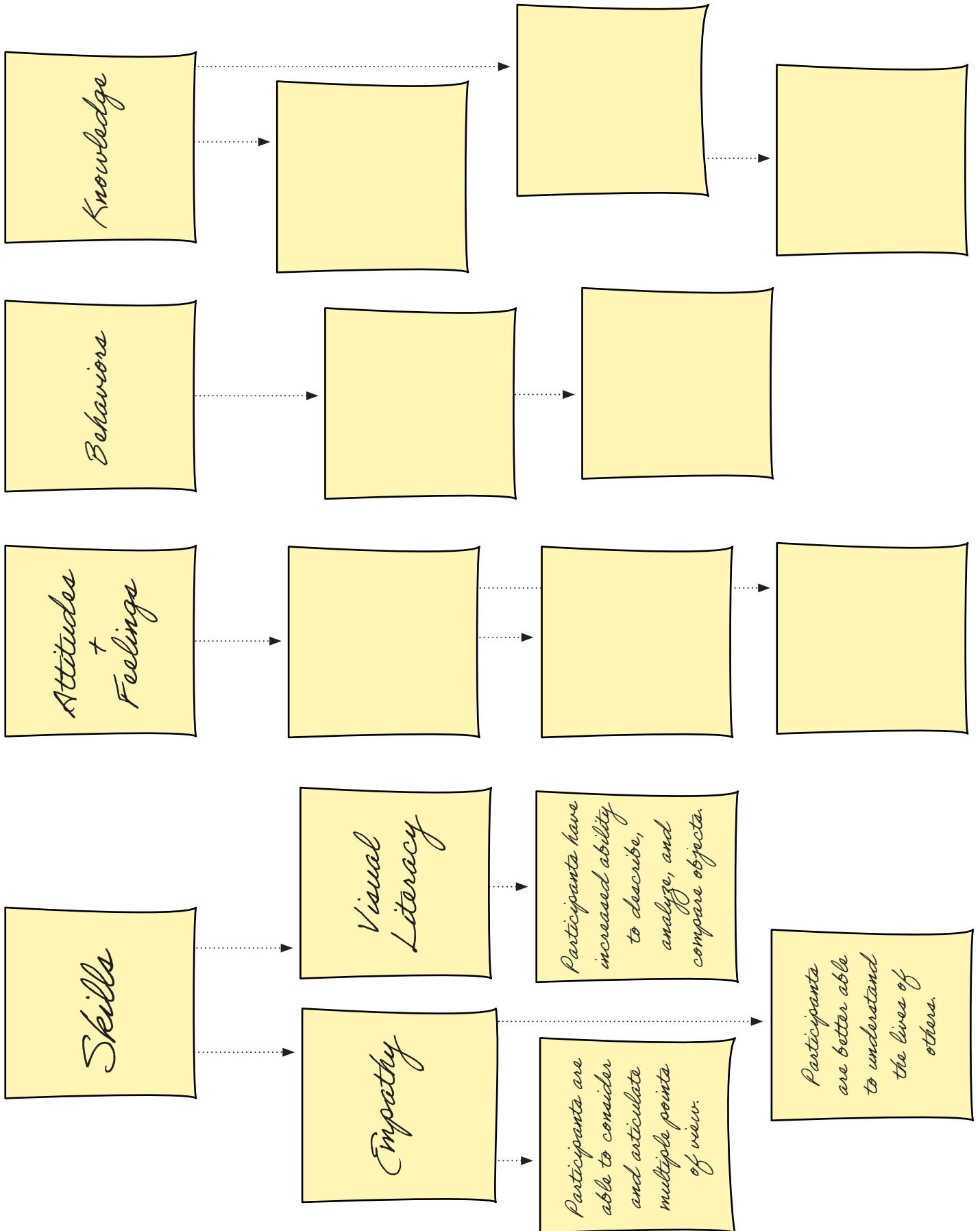
5. The answers that you come up with are what become the guiding stars of your program. You can also take time between this exercise and finalizing your learning goals to reflect on what you came up with during the brainstorming phase.

Learning goals are often discussed only in education departments, but the sticky note activity is a great opportunity to invite internal stakeholders into the process.

Think of it as a teaching moment for other colleagues who aren't as familiar with visitor-centered approaches. It can also be an opportunity to discuss the museum's goals with people from other departments and enrich your own program development.

These goals are key to evaluating the program.

An evaluation asks: did your audience leave with the skills, attitudes, behaviors, etc., that you wanted them to? When you have clearly defined learning goals, you will have a more informed result.



Identifying Your Stakeholders

*If you want to go fast,
go alone. If you want to go
further, go together.*

African Proverb

Inviting stakeholders into the process can help enrich your program. Stakeholders can be internal (i.e. colleagues, board members, volunteers) and external (i.e. donors, community partners, business leaders), each with their own valuable perspective.

For example, I worked with a regional history museum to transform one of their successful onsite school outreach programs into a virtual field trip. The content focused on Indigenous history in their state. We sought feedback from a member of the Indigenous community to ensure that the content was accurate, authentic, and sensitive. The museum then invited that person onto their teacher advisory committee so that future program development could benefit from their perspective.

As you plan your distance learning program, identify your key stakeholders and decide how you want to engage them throughout different design phases. Do they help define your goals? Do they provide an audience or community perspective? Are they possible funding sources or collaborators?

While incorporating stakeholders into the creation of your program may take more time and logistical planning, the product of that collaboration will yield an experience that is more inclusive and relevant to your audiences.

Stakeholder Discussion Questions

The following questions and activity help you think through who to involve and how to involve them.

Are there existing relationships you want to deepen?
Are there new relationships you want to establish?

What value and/or perspective do these stakeholders bring to your program? How can the relationship be mutually beneficial?

How can you compensate (financially, grant partners, shared marketing, etc.) external stakeholders for their time and knowledge?

How do you want to engage stakeholders throughout the different design phases of the program?

How do you bring stakeholders in without slowing down your process and sticking to your timeline?

Network Chart Activity

Another way to engage in these questions is through this Network Chart Activity. It can help you articulate the value of each stakeholder, how they can be included in the program development process, and specific action items for you and your team.

Stakeholders	What value/perspective do they provide?	What is their role in program development?	What are the next steps to including this stakeholder?
<i>Teacher Advisory Committee</i>	<ul style="list-style-type: none"> • <i>Understanding student needs/ interests</i> • <i>Expertise in curriculum standards</i> 	<ul style="list-style-type: none"> • <i>Review content before and during to ensure curriculum is aligned to standards</i> • <i>Pilot new program?</i> 	<ul style="list-style-type: none"> • <i>Schedule committee meetings for the year</i> • <i>Establish best form of communication</i>

Identifying Your Technology Needs

It's finally time to think about technology! For some, technology may be synonymous with distance learning, but technology for its own sake isn't the point.

Technology is an enabler—a means by which museums can deliver programs. Therefore, when you have the time to focus on the other pieces of knowledge (target audience, learning goals, and stakeholders), you can make a more informed decision about what type of technology you need.

Before diving into decisions about hardware or software, it's important to keep in mind these questions about tech:

Is it Flexible?

Sometimes you begin a distance learning program with a precise understanding of your program goals and audiences needs. Sometimes you don't. You may have a grant or a deadline that requires you to purchase tech before you've fully thought through your program goals and audience. That's okay! Do your best to balance what you think your audience and museum need, while allowing some flexibility in case those needs change.

Is it Sustainable?

When you select technology, consider how it will be maintained by staff and by funding over time. Some museums think about digital technology and strategy in two-year increments since it changes so quickly.

Is it Variable?

Invite colleagues to think about technology. Peers can help you consider: how can this tech be used beyond your department? How can this purchase be shared strategically and financially with other departments?

Technology Audit Questionnaire

The following technology audit questions can help you identify the tech you already have, start conversations with your colleagues, and reflect on the questions above about flexibility, sustainability, and variability.

Platforms Inventory

What system(s) or platform(s) does your museum already use to engage audiences online?

What system(s) do you have to manage your collection? How about the website? Are these systems able to easily integrate with other platforms?

What hardware do you have that could be used to deliver distance learning programs?

What sort of Wi-fi capability does your museum have? Are there dead zones?

Planning for Use

Is the hardware, software, or platform easy for the audience to use? Is it easy for you to use? If not, why?

What technology is your audience already using?

What financial or staff resources do you have to invest and maintain the technology?

Selecting a Technology

Will you build or buy? What are the pros and cons of each?

If you select a technology, do you want other departments or colleagues to be able to use it? If so, will they be able to help maintain and share the cost of it?

What technology can you pilot easily and then scale up?

What risks are you willing to take?

distance learning types

Now that you understand your audience, learning goals, stakeholders, and technology needs, it's time to select how you're going to deliver these programs. In this section, we'll look at three types of distance learning. You'll see a definition followed by my 3-2-1 approach: three pros, two cons, and one best practice to help you determine which format best suits your needs.

Virtual Field Trips

A virtual field trip is a synchronous (live) interaction on a platform like Zoom or Google Meet, between a group of learners and the museum. It often has pre- and post-visit activities to prepare for and extend learning beyond the live interaction. The pre- and post-visit activities are often created by the museum, but facilitated by the teacher.

3 Pros

Increase Access: Virtual field trips allow learning groups from anywhere to connect with your museum. Distance learning enables communities that have limited funding, transportation, staff, or other barriers, to engage with your collection.

Go Behind the Scenes: Virtual field trips are opportunities to showcase objects and places that visitors don't usually see. An educator facilitating a live field trip may be allowed in art storage or the conservation lab where a large tour group would not be able to go, or to show an object that is rarely on view.

Incorporate Multiple Voices and Content: The pre- and post-visit activities can leverage digital content that your museum already has or invite new collaborations with colleagues. For example, an audio guide, video series, and podcasts are all assets that can be used in this context. Pre- and post-visit activities are also an opportunity to highlight other museum or community voices. Interviews with curators, exhibition designers, or external stakeholders enable you to elevate multiple voices within one program.

2 Cons

Missing the Physical Space: Virtual field trips enable tours to happen, but they don't replace the physical museum environment. Walking through the galleries, seeing objects paired next to each other, or stumbling upon a new object, is difficult to replicate in the virtual world. While you could argue that missing physical space is true for distance learning in general, the term "field trip" conjures a physical standard that audiences may compare with virtual experiences, even if unfairly so.

Mismatched Platforms: The platform you want to use and the one your audience wants to use may be different. This became apparent during COVID-19 when schools moved to remote learning. I heard teachers express concern about having to re-teach students how to access a new platform from the museum, preferring if the museum came into their virtual classroom on the platform they were already using.

1 Best Practice

Leverage the Digital Space: Since a virtual field trip is digital, it allows you to use features during the live session including the chat box, collaborative tools (like Jamboard, FlipGrid, Kahoot, or Padlet), or other polling/trivia tools. You can also use analog strategies to keep the program interactive such as movement, writing, building, or drawing. You want to avoid being a talking head that could have otherwise been a recorded video.

Online Courses

Online courses can be a Massive Open Online Course (MOOC) or a time-bound course for credit for teachers or students. They are usually multi-week, self-paced, and stored on a learning platform that can include synchronous and/or asynchronous content.

3 Pros

Self-Paced: Online courses allow learners to move through content at their own pace. This flexibility is appealing to many student and adult learners balancing priorities such as work, family, and other activities. When learners can move through content when it suits them (often called “anytime, anywhere learning”), it allows for meaningful and relevant engagement.

A Mix of Synchronous and Asynchronous Content: While much of the content in an online course lives in the Learning Management System, or LMS, as asynchronous (i.e. videos, discussion forums, articles), courses can be created to include synchronous elements such as weekly office hours, guest lectures, online or in-person meet-ups, demos, etc. This mix of synchronous and asynchronous components allows opportunities for actual, live dialogue with the museum, as well as peer-to-peer connections.

An Opportunity to Involve Stakeholders: When you create online courses, you can invite your stakeholders into the curriculum development process. If you look back to your network map, who might enrich the course you’re creating and how? Can curators help select objects to support the course? Can community partners provide diverse perspectives on sensitive topics? Can teachers provide feedback on written content? These are just a few ways to build shared ownership and diverse perspectives in the courses from across the museum and your community.

2 Cons

Low Completion Rates: Online courses are notorious for low completion rates.³ This shouldn’t be a deterrent, but it’s something to keep in mind when setting expectations. As a facilitator, you can check in with those who aren’t completing work and see what might help them re-engage.

Cost Factors: Because online courses exist on learning platforms, they may require more financial investment to get them started. Finding other colleagues or departments who also might use the learning platform, could mitigate the financial burden on a single department.

1 Best Practice

An Online Course is Not a Textbook: Even though you are creating an online course, be mindful of how much text you’re writing. It can feel overwhelming for the learner if the course is simply module after module of text. Leverage the online platform by integrating discussion forums, collaborative tools, multimedia, writing, etc. throughout.

³Lederman, Doug. “Why MOOCs Didn’t Work, in 3 Data Points.” January 16, 2019. <<https://www.insidehighered.com/digital-learning/article/2019/01/16/study-offers-data-show-moocs-didnt-achieve-their-goals>>

Online Resources

Online resources come in many shapes and sizes. A resource might be a webinar, educator resource site, a pre-recorded video, or other “off-the-shelf” resources for your audience. They are packaged offerings that allow audiences to easily access the information or ideas they’re looking for.

3 Pros

Long Shelf Life: Online resources, which have the least amount of synchronous content, can be created and then shared without much ongoing maintenance. Once a webinar is recorded and shared, or a lesson plan is written and posted, they can live on the chosen platform for your audience to use whenever they want.

Created on Your Schedule: When you’re planning a release of online resources, you can schedule it based on your own workflow. It isn’t necessarily dependent on the start of a semester or season.

A Gateway for Deeper Engagement: Online resources can help users find connections they weren’t expecting. For example, you can pair a webinar recording with links to lesson plans, related artworks, upcoming exhibitions, programs, etc. Linked resources can be a gateway to deeper and enhanced engagement.

2 Cons

One-Way Communication: Online resources don’t have the conversational aspect of other forms of distance learning. They are meant to be used as needed. However, museums can still receive feedback. Often, the platform that an online resource lives on has built-in analytics, allowing you to gauge which resource is most played, downloaded, or accessed.

Less Community Building: Online resources don’t build or connect a community of learners. They are one-way communication channels.

1 Best Practice

Market Your Resources: Work with other departments and community partners to share your online resources. As new content is created, especially in conjunction with events or exhibitions happening at your museum, let your marketing department know so they can include it in their newsletters and social campaigns.

What Do You Do Now?

It doesn't matter how big or small your museum is. Distance learning doesn't have to be a distant dream.

After working through this guide, you can begin creating content that addresses your audience needs, aligns to your museum's goals, and invites key stakeholders into your process. You can select a distance learning format that best suits your museum and begin your journey.

Start right here with a quick action plan. What are the next three steps you're going to take to move forward on this journey?

1.

2.

3.

Keep in mind: you might trip and fall. You could walk into dead ends and turn around. But the journey is worth it. Distance learning equalizes opportunities for learners who may not be able to come to the museum. It opens another access point for underserved audiences. It is also an incredible opportunity to engage and elevate multiple voices and perspectives.

Now you have a map, keep going!

Additional Resources

[Art of Relevance by Nina Simon](#): This book is available for free online. The website also includes her TED Talk.

[Shaping Outcomes](#): Free online course developed by the Institute for Museum and Library Services and Indiana University–Purdue University Indianapolis. This resource walks you through, step-by-step, to develop outcomes and complete a logic model.

[SMART Outcomes](#): SMART Outcomes stands for Specific, Measurable, Achievable, Relevant, and Timebound. Use this link by Samhsa Native Connections to dive deeper into how to create these types of learning outcomes or goals.

[Museum Audiences: A Visitor-Centered Perspective](#): John Falk is well-known for his research and categorization of different types of visitors. This article reviews those categories and explores the importance of visitor-centered approaches.

[Museum Learning Hub](#): Free, self-paced, online courses for small museums on a variety of topics such as accessibility, podcasting, digital project management, and more.

[Using Focus Groups in a Museum Setting: A Guide](#): A helpful guide on how to plan and implement a focus group in your museum, created by Harriet Foster at Renaissance East of England.

About the Author



Emily Kotecki is an award-winning museum educator based in Raleigh, North Carolina. Emily consults with numerous museums across the United States on distance learning programs.

She is also the host and producer of both the [Microsoft Libraries and Museums Podcast](#) and her own podcast, [Museum Buzz](#).

Prior to consulting, Emily created distance learning programs and interpretive tools at the North Carolina Museum of Art. Her career began in political journalism at The Washington Post, where she hosted a daily political podcast and weekly show on XM-Sirius Radio.

If you want to chat about this workbook or work with Emily, contact her at: emily.kotecki@gmail.com. You can also see more examples of her work at emily-kotecki.com.

Editors: Laura Hoffman, James Kotecki, Kristin Smith

Graphic Designer: Sund Studio

©2021, Emily Kotecki