



DIGITAL INVENTORY



Expected stage of the ecomuseum

Already developed ecomuseum, Ecomuseum in progress



Target people

Community members, Ecomuseum staff

Description of the tool

The digital inventory is based on the development of capacities to facilitate the digitalization of the ecomuseum's collections using cell phones and other low-cost technologies, maintaining criterious schemes for managing the digitalization and for the online diffusion of collections. The definition of criteria to categorize collections is based on key aspects of local heritage, and the new technologies have been opening convenient possibilities for the digitalization and diffusion of collections maintaining high standards of quality.

In the last decades, the presence of museums in the digital world was limited to institutions with availability of huge financial and technical resources. The equipments necessary to digitalize collections used to be expensive, as there was a need of establishing and maintaining high standard tools and laboratories. Nowadays, the propagation of smartphones is facilitating this process, as the personal devices have high quality cameras sufficient to capture good images for digitalizing collections.

It is necessary to define criteria and maintain certain standards in the digitalization process, aiming to have the proper flow for democratizing collections. In this sense, the digital inventory is a proper tool for the ecomuseums, considering each context and availability of resources. A well-defined workflow, with proper criteria, can contribute to more democratic ecomuseums with open access collections.

Guidelines to apply the tool

- Definition of device typologies and workstation:** The process of digitalization will be based on the availability of equipments. Low-cost smartphones can be defined as the basic equipment for the working process. Additionally, it is necessary to have a space for installing the workstation, with adequate lighting and a computer with an HDD or SSD to store the captured collections.
- Technical criteria for managing the digitalization:** It is essential to have a clear definition on which collections are going to be digitalized, with proper database softwares to maintain a safe inventory. Additionally, it will be necessary to define the minimal resolution to capture the collections, as well as a proper software for digitalization.
- Working scheme for facilitating the process:** A clear workflow will facilitate the working process, avoiding any mistake in the digitalization. It is suggested to have it printed in a visible place, to be easily consulted at any time necessary.
- Online diffusion under Creative Commons license:** A Creative Commons license will democratize the collection, enabling its diffusion with proper mentions to authors and precedence.
- M&E of the working process:** A constant M&E process is necessary to monitor the progress of the digitalization, with proper goals defined in the beginning of each process – established, for example, as a project with measurable and verifiable results. It is a strategic way of maintaining the institutional memory of the digitalization process, supporting the gathering of documents and information related to the technical work developed by the ecomuseum.

Support materials

The [Portable Museum Project – Pocket Edition](#) is developed under a partnership between the Goethe-Institut São Paulo, Instituto Moreira Salles and Wiki Movimento Brazil. This project resulted in the development of the Portable Museum Manual, a tool used as a reference for digitalization in Brazilian institutions. This initiative can be replied in other institutions, and the reference used by ecomuseums can also be based on methodologies developed by institutions working with culture heritage inventories, such as the the Brazilian Institute of Museums (IBRAM) and the Brazilian National Institute of Cultural Heritage (IPHAN).

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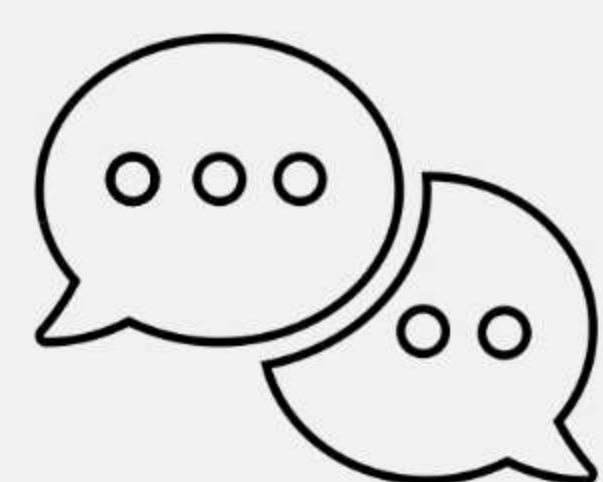
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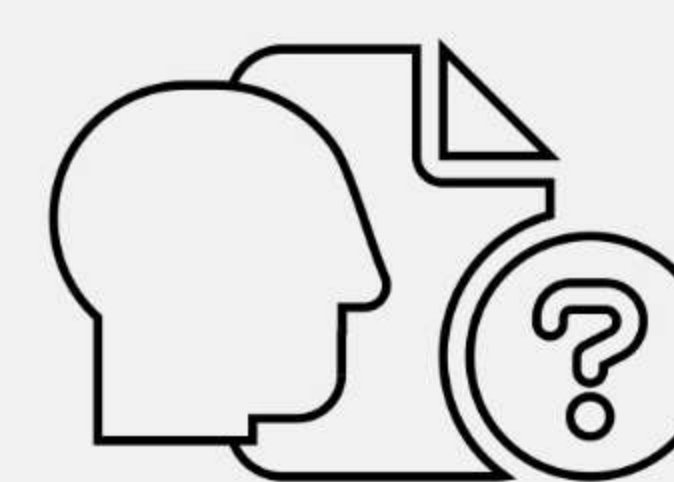
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Social Entrepreneurship on Local Heritage

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SOCIAL ENTREPRENEURSHIP ON LOCAL HERITAGE



Expected stage of the ecomuseum

Already developed ecomuseum, Community with intention to start an ecomuseum, Ecomuseum in progress



Target people

Community members, Ecomuseum staff, External partners, Local authorities

Description of the tool

Social entrepreneurship targets the underserved, developing sustainable business ideas (products and services) to address **common societal challenges and create transformational social value**. This approach has the potential to create job opportunities and generate income to unemployed people, especially youth. It also promotes social inclusion, enhancing people's self-esteem and sense of belonging to their communities by valuing traditions, preserving ancient knowledge and protecting the environment. Thus, contributing to the socio-economic development of local communities and also to the **UN Sustainable Development Goals**.

Ecomuseums' work contributes to the study, preservation and promotion of cultural and natural heritage. Making a social investment in their communities (using a strategy called *Venture Philanthropy*) would maximize value creation, ensure the sustainability of their work and enhance social impact. This investment could be non-financial, as many ecomuseums have scarce financial resources. Ecomuseums could support social entrepreneurs with their expertise on local heritage, providing capacity-building, establishing partnerships, facilitating networking and fundraising activities, for example. Here we propose steps to plan, implement and monitor this social investment, also indicating some resources to apply this tool.

Guidelines to apply the tool

- **Mapping your assets:** Identifying the resources that the ecomuseum has to offer (expertise, installations, human resources, partnerships, funding, etc.). One example is the knowledge gained from the participative inventory of the local heritage (see "Participatory Inventory" tool): what to recover, protect, preserve and promote.
- **Assessing the needs of the community:** Using suitable **qualitative research methods (interviews, surveys, focus groups, etc.)** to: (a) identify social and environmental issues of local concern (such as youth unemployment, marginalized groups, social exclusion, elderly isolation, deforestation, water pollution, wildlife extinction, etc.); (b) verify community members' availability and willingness to participate; (c) identify relevant stakeholders and target groups; (d) also raise awareness and motivate them.
- **Planning activities:** Based on the results of the previous steps, co-develop (with the identified relevant stakeholders and target groups) a detailed support plan, including baselines, goals, milestones, and target outcomes for the participants.
- **Delivering the support:** Brainstorming and developing problem-focused and solutions-oriented innovative ways to tackle societal challenges, using the available resources and seeking external support (capacity-building, networking, partnerships, fundraising, etc.).
- **Measuring impact:** Create a mechanism to monitor the social impact of the initiatives, gaining valuable inputs to better manage the process and make necessary adjustments to maximize/optimize it.
- **Sharing the results:** Communicate the successes and/or lessons learned from the initiatives to promote them, engage the public and inspire others (see "Integrated Marketing Communication" tool).

Support materials

The publication "**Adding value through non-financial support – A practical guide**", published by the European Venture Philanthropy Association (EVPA), plots the costs and added value of non-financial support. It also lists the best ways to encourage your investees and grantees to produce solid societal outcomes.

Developed by the "**Prosoa Rural**" project (2018-2020), co-funded by the Erasmus+ Programme of the European Union, the "**Social Entrepreneurship and Cultural Heritage**" training module aims to promote the initiative and social entrepreneurship of young people based on Cultural Heritage and Traditions.

The comprehensive training course developed by the "**Cultural Heritage Entrepreneurs**" (CHEER) project (2018-2020), also co-funded by the Erasmus+ Programme, provides support to participants to find business ideas, develop social enterprises, provide local capacity building and foster social inclusion with focus on local cultural practices and heritage.

The report "**Measuring and managing impact – A practical guide**", also developed by the EVPA, provides tips on how to implement impact measurement in five easy-to-understand steps, at the level of both the social investors and their investees.

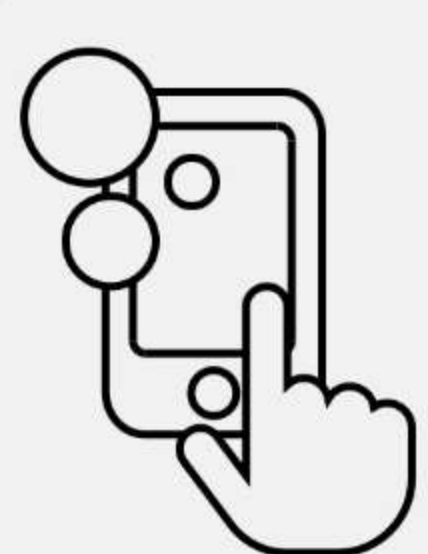
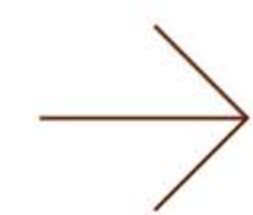
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Integrated Marketing Communication

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INTEGRATED MARKETING COMMUNICATION



Expected stage of the ecomuseum

Already developed ecomuseum, Community with intention to start an ecomuseum, Ecomuseum in progress



Target people

Community members, Ecomuseum staff, External partners, Local authorities

Description of the tool

Integrated Marketing Communication (IMC) can be described as a process used to unify communication efforts in order to deliver a consistent message/image, across different channels, that remains relevant over time to the public. It examines who the target audiences are and how, where and when to communicate in order to engage them. An IMC plan, well designed and tailored to each context, could help ecomuseums to strengthen long-term relationships with their publics (community members, visitors and other stakeholders). This would allow a greater participation in their activities, and also the promotion and safeguarding of their cultural and natural heritage.

The general model of IMC can be divided into four main stages: research, planning, implementation and monitoring/evaluation. The process of implementing an IMC plan can be simplified and adapted to the particular contexts of ecomuseums. It is necessary to take into account the ecomuseum's available resources (human, financial, material, etc.) and its surrounding environment (political, economic, social and technological). There are **several ways to reach each target group**: direct contact, website, social media, events, press releases, public relations, advertising, etc. For some ecomuseums, in rural areas with a small and elder population, direct personal contact could be the best approach. For others, in urban areas connected to the digital world, social media could be an advantage.

The aim is to deliver coherent messages, through appropriate channels, in order to reach and engage its audiences. Here we propose steps to develop and implement a tailored IMC strategy by ecomuseums, also indicating some resources to apply this tool.

Guidelines to apply the tool

Research:

- Identify the ecomuseum's stakeholders.
- Conduct internal and external consultation of stakeholders (brainstorming, surveys, workshops, media research, benchmark, etc.) to identify:
 - the ecomuseum's mission, values and purpose (internal);
 - relevant themes for the ecomuseum and each stakeholder group.
- Validate the results of the analysis with the stakeholders involved.

Planning:

- Based on the research analysis, **map the ecomuseum's stakeholders** and indicate: their levels of power/influence, key interests/issues, and best ways to reach them (channel and frequency).
- Define communication pillars: the most relevant topic areas (up to three) for both the ecomuseum and its stakeholders.
- Define objectives for the IMC plan that are Specific, Measurable, Achievable, Relevant, and Time-Bound (SMART).

Implementing:

- Define key messages for each pillar, in line with the defined objectives and stakeholders, that get Attention, hold Interest, arouse Desire and obtain Action (AIDA model) of the audiences.
- Use a **Mix of Communication Channels and Tactics (paid, owned, earned and shared media)** that is at the ecomuseum disposal and most appropriate to reach each target group.
- Develop contents (adapted to each channel/tactic and target group), related to the key messages, that inspire and foster conversations with and between stakeholders.
- Schedule strategically when to deliver each communication effort.
- Budget each tactic to ensure that their implementation is financially realistic.

Monitoring:

- Establish Key Performance Indicators (KPIs)**, and means of verification, for each objective, communication pillar, and communication effort.
- Evaluate and control the KPIs, against initial objectives, to measure impact and adjust the strategy accordingly if necessary.

Support materials

The "HERITAGE-PRO" project, funded by the European Union ERASMUS+ Programme (2018 – 2021), developed interdisciplinary training for professionals towards sustainable management and preservation of cultural heritage. One of its training modules, the "Effective Communication in an Interdisciplinary Environment", cover different communication areas that may help ecomuseums' professionals to implement their communication objectives.

The online learning platform Course Hero, has training modules on IMC that can be helpful in "Determining IMC Objectives and Approach" and "Defining the Message".

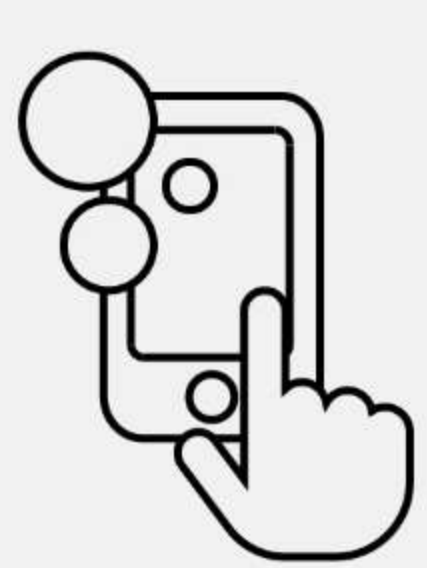
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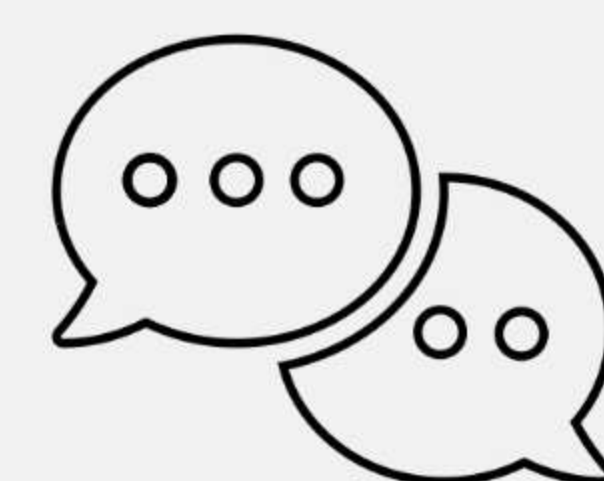
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PARISH MAP



Expected stage of the ecomuseum
Already developed ecomuseum,
Community with intention to start an
ecomuseum, Ecomuseum in progress



Target people
Adults, Associations, Enterprises,
Institutions, Students



Implementation time
6-18 months

Description of the tool

Parish maps are cartographic representations or any other similar item in which the community can identify itself through the heritage (Leslie, 2006).

With a Parish Map the inhabitants of a place can represent their heritage, landscape, and knowledge in which they recognize themselves and that they wish to transmit to future generations. Parish Maps highlight the way in which a community sees, perceives, and values its landscape, its memories, its transformations, its current reality and its wishes for the future.

In Puglia Region this kind of map was used for the new "PPTR" (the Regional Landscape Planning). In homogeneous Italian areas, Parish Maps became tools both for planning and for local development. In Italy more than 50 ecomuseums developed one or more parish maps. Some of them produced web versions of the maps. Few of them used similar tools called "landscape maps".

This is usually one of the first programmed actions in the phase of planning of Italian ecomuseums. Recently the tool has also been used by other institutions such as parks and in local development processes.

A parish map documents the present and helps people understand the past; it also helps the community to plan a long-term agenda aimed at improving and enhancing places and landscape. In the map, you can find the wishes of the community (Clifford, Maggi, Murtas, 2006).

Guidelines to apply the tool

Many Italian maps followed these steps:

1. Chose one or more goals (heritage celebration and recording, action plan planification, strength of sense of place etc.)
2. record all the elements of cultural and natural living heritage (tangible and intangible) through:
 - Working groups of adults;
 - School children educational paths;
 - Population surveys;
 - Multimedia maps;
 - photo contest
3. chose the elements to be included in the map according to cultural and social criteria; the result is a participatory inventory of the heritage
4. Local artists or geographers design a draft of the map with the support of the population
5. The final map is approved by the population
6. The map is printed and distributed to citizens and/or published into the websites
7. use the map (for education, urban planification, ecomuseums actions planification). To use the map for planification is often useful a digital version of the map through a GIS system
8. update the map. Ecomuseums' Italian parish maps don't end with their publication, because those maps are seen as participatory processes, permanent and updatable "archives", of the tangible and intangible heritage of a territory. To update and implement parish map contents, some ecomuseums created multimedia maps. They contain the follow-ups related to the heritage included in parish maps. Other ecomuseums designed new maps

A critical evaluation of such a participation tool raises two questions: can this type of map help the community to represent itself, or is there a risk of becoming part of a stereotypical landscape? And isn't there also the risk of hiding the elements of conflict present in the territory, only by highlighting the pleasant aspects? (Castiglioni, 2013).

In many Italian contexts parish maps enabled and inspired people of different generations and roles, including municipal administrators, to discover, see, use and modify the living cultural heritage and landscape. Furthermore, participatory maps, containing a shared vision of the future of the landscape, have inspired permanent changes in the landscape.

Support materials

Some web sites (in italian) reported case studies, support material and guidelines:

<https://sites.google.com/view/ecomuseiitaliani/chi-siamo> shows the atlas of the more than 50 eco-museums that have created a community map with the link to see the results. The process of creating a map of a community map (Parco dei Mulini) is described on the [website of the Parabiago ecomuseum](http://www.mappadicomunita.it).

www.mappadicomunita.it shows some italian maps

<https://inventariopartecipativo.wordpress.com> a course about parish maps (in italian)

<https://sites.google.com/view/mappadicomunita/home> a website about some parish maps

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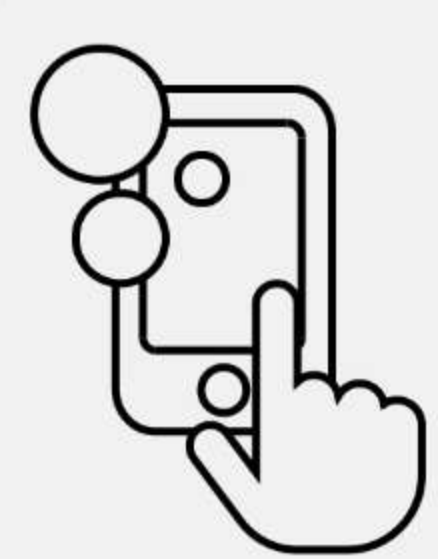
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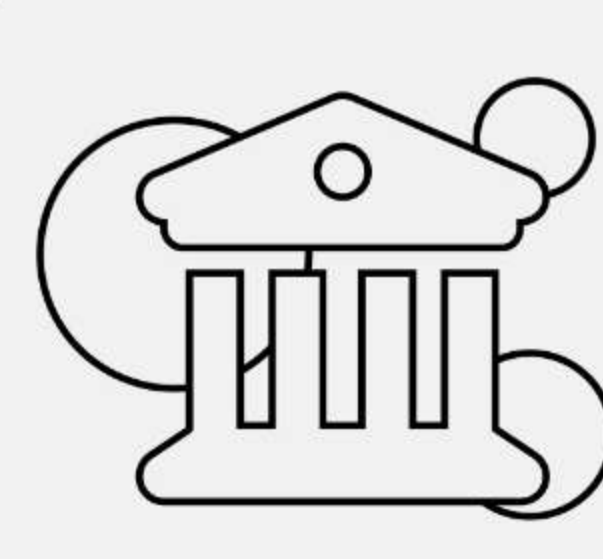
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ECOMUSEUM PLANIFICATION



Expected stage of the ecomuseum

Already developed ecomuseum,
Community with intention to start an
ecomuseum, Ecomuseum in progress



Target people

Adults, Associations, Enterprises,
Institutions



Implementation time

3-6 months

Description of the tool

Ecomuseums, as a museum of the community, are legitimated by the participation of the community. For this reason, many ecomuseums are designed, and are working, not according to the traditional logic which consists in the Institution planning and acting "for" the community, often excluding people from the decisional and design processes. The plan and the work of these ecomuseums are carried out "with" the community, according to the logic of participatory planning and active citizenship.

Public forums and other ways of participation were created. Owners of lands and of cultural heritage, municipalities, museums, parishes, water treatment companies, associations, farmers, traders and artisans, public and private educational Institutions and single citizens, were encouraged to be informed, to discuss and interact, to shape the idea of the ecomuseum, to design multi annual action plans and to activate their resources, knowledge and skills in order to realize the planned actions.

From the point of view of ecomuseums, the participation process is at least as important as the results and the outcomes of the planned actions. In fact, the interaction of the local actors is essential in order to create both a sense of place and community and to release energy to achieve the planned goals.

Italian ecomuseums designed their own participation toolkit to plan in a participating way and explain them in their strategic Manifesto .

In 2021 inside the celebration of 50 years of ecomuseology italian ecomuseums considered these two tools:

Critical balance of the whole cultural heritage present in the territory as a householder would do with his/her own family heritage. The existence of such a budget, based on the preliminary census, will not only guide the choices regarding organization and use, but will also allow a better evaluation of possible economic strategies. The following grids may appear redundant, but they mark various stages or various levels of the same reflection. Collective work is needed here, bringing together as many local actors as possible. Hugues de Varine shows these tools in "The roots of the future", p. 111 Italian edition (a rough translation in English is [here](#))

Heritage Planning for Sustainable **Cultural Impacts**. The Inside-Outside Impact Model, by Douglas Worts is a way to link a wide array of possible public engagement strategies related to [climate change action](#), that can have impacts both inside and outside [heritage organizations](#).

Guidelines to apply the tool

The balance sheet

The goal of this tool, as a basis for reflection, is to draw up a critical balance of the whole cultural heritage present in the territory as a householder would do with his / her own family heritage. The existence of such a budget, based on the preliminary census, will not only guide the choices regarding organization and use, but will also allow a better evaluation of possible economic strategies. The following grids may appear redundant, but they mark various stages or various levels of the same reflection. Collective work is needed here, bringing together as many local actors as possible.

1. Value of cultural heritage

Different types of value	Private	Community	Public
Symbolic, political, imaginary			
Affective, sentimental			
Scientific			
Technical, industrial			
Cultural			
Use			
Direct economic			
Potential economic			
Indirect economic			
Other			

The three columns on the right can be filled in different ways:

- for each asset or group of cultural assets, with written "value judgments", with annotations according to a criterion to be decided locally or with simple crosses;
- for the totality of the cultural heritage, indicating in the three columns on the right the material or intangible elements that are considered most important for each type of value.

The essential thing is to proceed in a "contradictory" way to bring out a consensus within the community on the necessarily subjective value attributed to the various elements of the cultural heritage, recognized as such.

Heritage

The heritage status can be assessed by making use of lists and placing local heritage items in boxes, depending on what they represent.

Status	Good	Medium	Bad
physical (conservation, possibility of restoration)			
availability (for development)			
accessibility			
notoriety (Internal, external)			
dynamics (degree of activity)			
other			

The goal of this subdivision is to determine at the same time the interventions to be implemented, their scope, the time required and the assets immediately usable.

Cost / income ratio of cultural heritage

	Costs / negative	Revenue / positive
direct financial		
indirect financial		
social		
human		
degree of political risk		
other		

It is a question of proceeding with an estimate of the cultural heritage in its entirety, in order to establish an evaluation, obviously more qualitative than quantitative, but essential for future strategic choices. This work will also serve to measure the level of awareness that the population and the different categories of actors (administrators, owners, associations, citizens, young people, etc.) have of cultural heritage.

2. List of resources

Framework of the capital (patrimonial)

A synthetic picture of the cultural heritage of the community will be drawn up, in order to make visible opportunities and gaps.

Capital	Cultural	Mixed	Natural
Property	Sites Monuments Residences Street furniture Infrastructure Planning		
Mobile	Objects and machines Papers Collections		
Immaterial	Landscapes Beliefs Knowledge Traditions		

It is not a question of drawing up new lists, but of determining the elements that are significant for the development of assets and which will be taken into account in medium and long-term strategies.

Cultural heritage environment

A similar framework will then have to be prepared for all the instruments and services more or less closely linked to each other and connected to the cultural heritage: derivative products, commercial structures, information centers.

Support materials

Hugues de Varine, "The roots of the future", p. 111 Italian edition (a rough translation in English is [here](#))

For more details about the inside/outside Model by Douglas Worts see the [Author explanation](#), [the presentation](#) and [this paper](#)

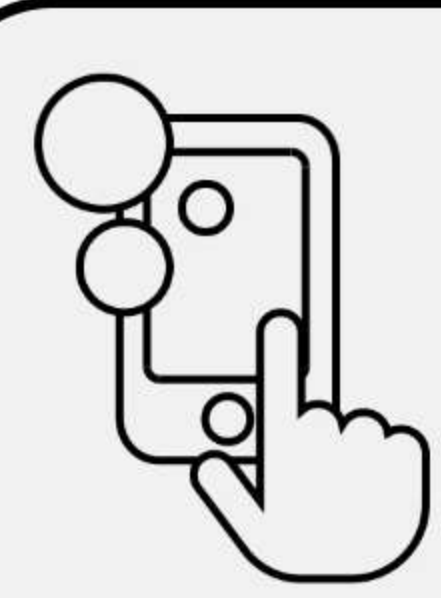
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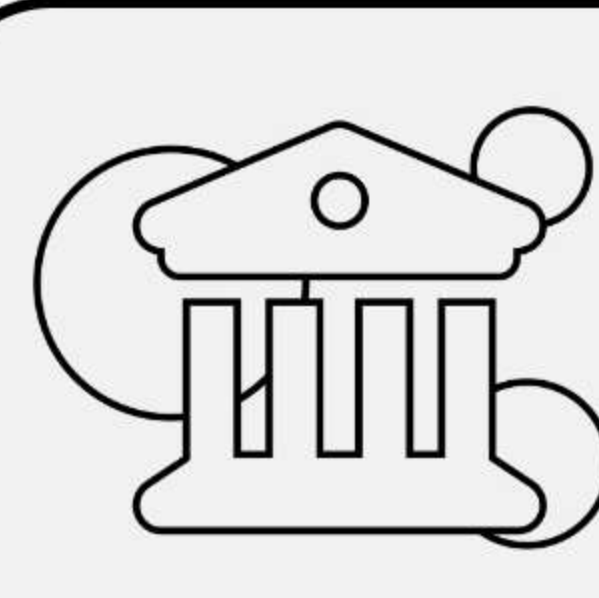
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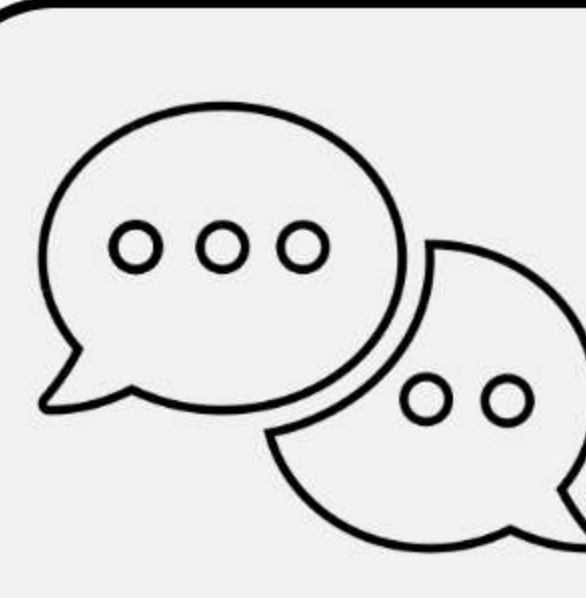
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The use of the heritage for the sustainable local development

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THE USE OF THE HERITAGE FOR THE SUSTAINABLE LOCAL DEVELOPMENT



Expected stage of the ecomuseum
Already developed ecomuseum,
Community with intention to start an
ecomuseum, Ecomuseum in progress



Target people
Adults, Associations, Enterprises,
Institutions, Students



Implementation time
12 -18 months for the regulationation -
from 2 and more months to design and
realize a cooperation agreement.

Description of the tool

The aim of ecomuseums is not only the realization of participatory activities, but also to trigger cooperation agreements with citizens, for the care, management, and regeneration of the cultural heritage and the landscape.

Ecomuseums arrange human resources, skills and personal knowledge of its partners that are working together with full independence. Through cooperation agreements, the network of stakeholders can build a community and new energies can be released and valued in the community itself. In this way, the ecomuseum becomes a tool of "shared administration" of living heritage and common goods.

Ecomuseums become facilitators that make people able to release energies, and share resources inside the community itself, for the common interest. The agreements that were concluded in Italy were both formal and informal. Some ecomuseums approved regulations for the active citizenship participation and the shared administration of living heritage.

This is a important development of the community participation idea, according to the movement that in Italy tried to apply and promote **the shared administration of common goods and the subsidiarity principle**.

Guidelines to apply the tool

- The ecomuseum empowers human resources, skills and personal knowledge of its partners
- A partner proposes an idea
- The Ecomuseum and the partner develop the idea and design the project
- The Ecomuseum and the partner define and sign a cooperation agreement
- The partner works with full independence with the help of the ecomuseum

According to this logic the ecomuseum carries out not only their "own" projects or events; it also help and empower citizens to carry out heritage based projects that are in line with the long term participation plan of the ecomuseum.



Support materials

The Parabiago ecomuseum web site reports the regulation,
the guidelines to activate the agreements (see image below),
the request form,
the activated agreements.

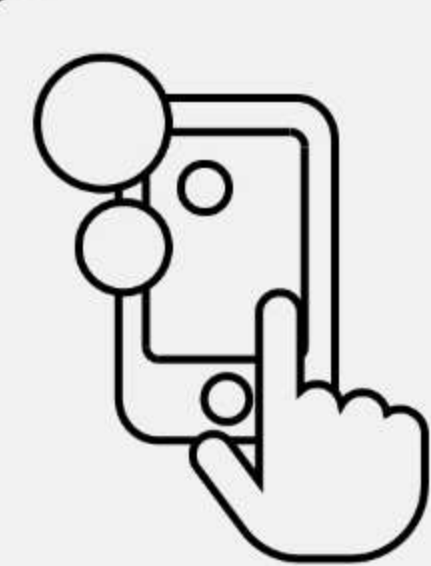
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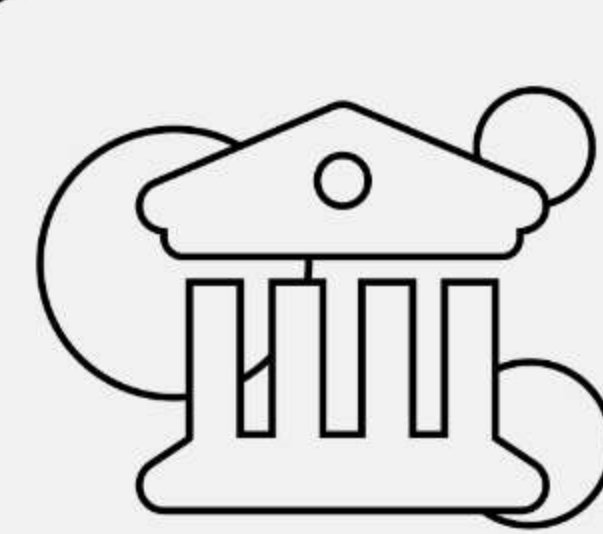
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HERITAGE EDUCATION AND INTERPRETATION



Expected stage of the ecomuseum

Already developed ecomuseum, Community with intention to start an ecomuseum, Early stage of ecomuseum development, Ecomuseum in progress, Preliminary stage of ecomuseum development



Target people

Community members, Museography and participatory and community work, Technicians and specialists in museology

Usefulness of this tool

Heritage Interpretation (HI) is used to:

- Planning and managing the heritage resources of a territory for public use.
- Generate interpretative media (panels, visits, audiovisual, digital media, etc.) for heritage assets and territory.
- Raise awareness of heritage protection among the non-captive public and the local population.
- Investigate and value cultural and heritage spaces and resources relevant to the population.
- Involve the population in the planning and research work of the territory and heritage, as well as in the training of indigenous specialists in interpretative techniques.
- Participatory delimitation of the territory and its heritage dimension.
- To make visible other (or new) narratives, discourses and interpretations about the territory and cultural and heritage assets.

Description of the tool

HI is a discipline that navigates between different disciplines and methodologies and aims to generate interpretative media and communicational messages between heritage resources (natural and cultural) and a non-captive audience. Its definition has evolved since its birth almost a century ago.

Heritage interpretation refers to all the ways in which information is communicated to visitors to an educational, natural or recreational site, such as a museum, park or science center. More specifically it is the communication of information about, or the explanation of, the nature, origin, and purpose of historical, natural, or cultural resources, objects, sites and phenomena using personal or non-personal methods. Some international authorities in museology prefer the term mediation for the same concept, following usage in other European languages.

Purposes of Heritage interpretation: Fascinating, not explaining. Wonder, not illustrate. Involve, not teach. The process is: to provoke, to correlate, to reveal.

We have selected the two most widely used in the professional and academic field:

1. **Association for Heritage Interpretation** (1996): "The art of revealing in situ the significance of natural, cultural or historical heritage to the public visiting such places in their leisure time".
2. **National Association for Interpretation** (2000): "Interpretation is a communication process that produces emotional and cognitive connections between the interests of the audience and the meanings inherent in the resource".

Freeman Tilden (1957), one of the fathers of interpretation, formulated a number of interpretative principles, which remain the basis of the discipline:

1. Any form of interpretation that does not relate the objects it presents and describes to something in the experience and personality of the visitors will be totally sterile.
2. Information, as such, is not interpretation. It is revelation based on information. They are two different things. However, all interpretation includes information.
3. Interpreting is an art that combines many arts to explain the subjects presented; and any art form, to some extent, can be taught.
4. Interpretation aims to provoke, not to instruct.
5. It should be the presentation of the whole and not of the parts in isolation, and it should address the individual as a whole and not just one facet of the individual.
6. Interpretation for children should not be a mere dilution of what is delivered to adults, it requires a radically different approach. It will need specific programmes.

Objectives

HI has two types of objectives. On the one hand, general objectives are directed at the resource. These are the objectives related to management, quality and enjoyment of the view, appropriate use of the resource, and social, cultural and economic profitability. On the other hand, the specific objectives are those aimed at communication, i.e. they are directed at the visitor. These objectives are divided into three (Morales, 2001):

- Educational objectives – what we want visitors to know.
- Emotional objectives – what we want visitors to feel.
- Attitudinal objectives – what we want visitors to do.

Target group are members of local community, organizations, heritage interpretation professionals. It is convenient to invite several and diverse stakeholders to the process in order to get different perspectives. It is advisable to work on two levels: training in heritage interpretation and taking advantage of what heritage interpretation specialists in the community can contribute.

This tool can be applied at any level of the existence of the ecomuseum, either in its project phase or in an existing and consolidated ecomuseum, since the work with the interpretation of heritage is an always valid tool both in the conformation of the project of the ecomuseum as in an existing ecomuseum.

Guidelines to apply the tool

Interpretive Planning:

Any interpretative action must be previously prepared with a methodology and specific goals. Planning is a process of analysis of means, services, programmes, resources, personnel and any other variable conducive to transmitting messages. It allows us to communicate meaning in an interesting and effective way, to contribute to the satisfaction of the visitor's needs, to protect the resource, and to improve the quality of life of the local inhabitants. In other words: Planning. It allows us to analyse and make decisions; ultimately to manage identity, heritage and economic development. From this planning will emerge the interpretive plan which is the document resulting from the planning process.

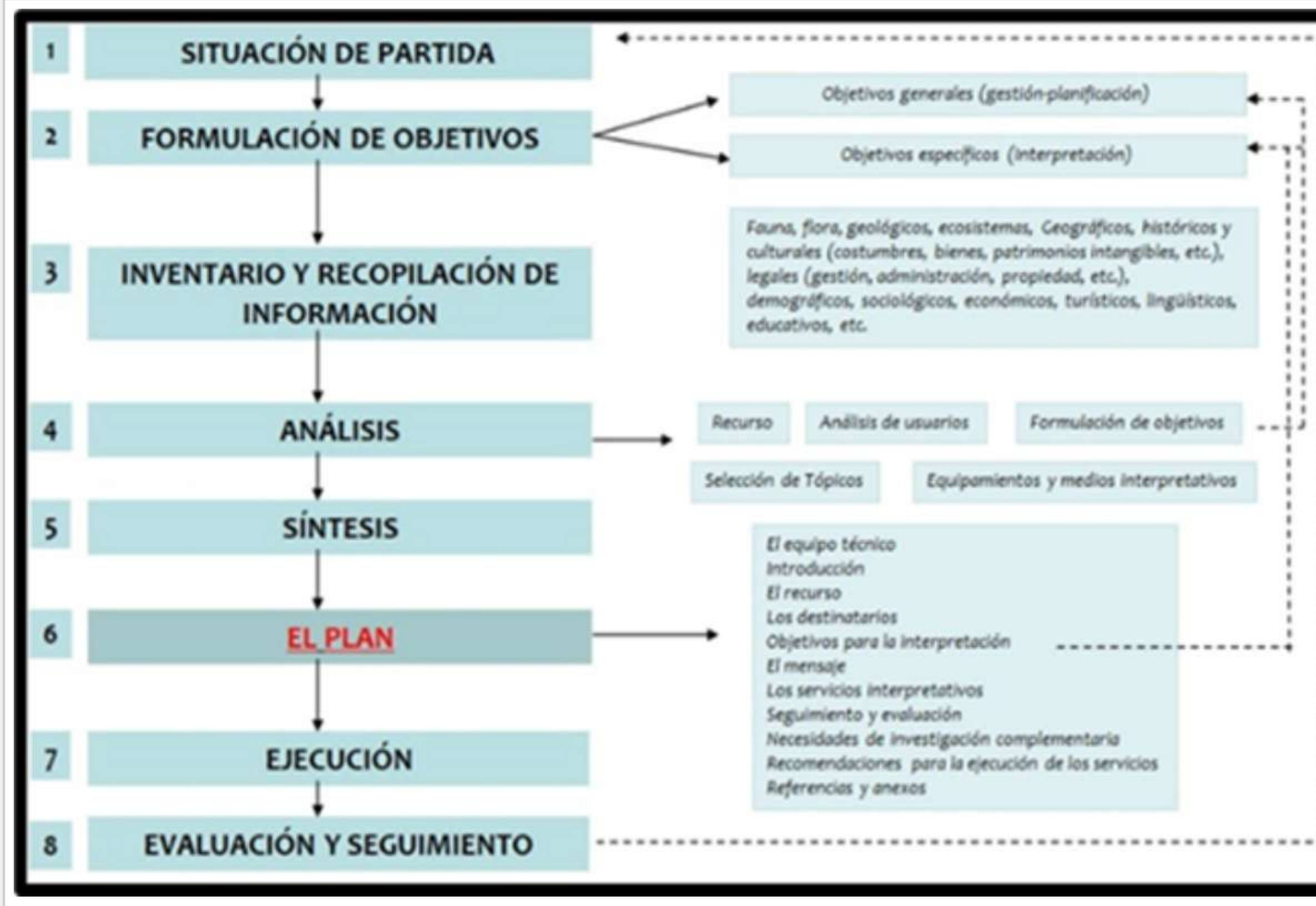


Illustration 1. Phases of Interpretive Planning. Source: own elaboration based on Morales, 2001.

Planning is a continuous process of analysis that is not closed and is open to change for its evolution and improvement (Morales: 2001, 171). It is made up of 8 phases that encompass what can be considered strategic planning, from the first contact with the territory and the resources, the documentary and field work, the analysis of the environment and the weighting of the variables that will delimit the interpretative messages, to the execution and evaluation of the interpretative plan (Illustration 1).

Inventory and compilation of information, since the inventory will have an accumulative phase, but in its evolutionary phase it will be selective, using the most relevant information for the fulfilment of the interpretative objectives; and 4. Analysis, since this is where the information compiled is sifted, selecting that which most helps the knowledge of the public (current and potential), the essential or interesting concepts and assets for interpretation, the existing spaces and infrastructures or those with possibilities. Likewise, weight is given to those assets that are the most representative or that allow obvious opportunities for interpretation.

Interpretative means:

The way to apply this tool is with the creation of personal interpretative media and/or non-personal interpretative media.

TYPE	SUB-TYPE	ADVANTAGES	DISADVANTAGES
Brands and panels	Information sign, interpretative sign, preventive information signor beacons	Clear and relevant information Reduced cost Minimal maintenance	Statics You are often the target of vandalism Possible visual impact
	Brochures, guides and posters	Speed reading Reduced cost Collects information on services Serves as a souvenir It can be consulted at any time	They produce waste Statics It is outdated.
Automatic audiovisual mechanisms	Videos, projections, soundposts, etc.	Quality information Generate or complement the atmosphere They motivate the visit. They provide specific information	High cost They require infrastructure and power supplies. Need control and maintenance

Non-personal or unassisted means are those that do not require the presence of the interpreter, the interpretative message is transmitted through other mechanisms and elements, such as signage, publications, self-guided itineraries, automatic audiovisual mechanisms, etc. Personal or assisted means pick up interaction between visitors and the interpreter, such as guided tours, staff-operated audiovisual devices, animations, workshops, etc.

TYPE	SUB-TYPE	ADVANTAGES	DISADVANTAGES
Specialised staff	Games, workshops, creative activities, toy libraries, sensory explorations, etc.	Supplementary information. They motivate the visit and the experience. They promote awareness and empathy.	They need qualified professionals. Require specialised conditions and materials The visitor must be motivated (duration)
	Videos, projections, soundposts, etc.	Quality information Generate or complement the atmosphere They motivate the visit. They provide complementary information The interpreter can interact, answer questions, etc.	High cost They require infrastructure and power supplies. Need control and maintenance They need specialised staff.
Visit	Guided tours, spontaneous services, tours in motorised or non-motorised vehicles	Personal contact. Motivating experience Skills required (tours with vehicles)	It cannot always be adapted to all groups. They depend on the weather. Specific security measures.
Animations (living history)	Passive (audiencedoesnotinteract) or active (audiencinteracts)	The interpreter can comment, make clarifications, etc. It motivates the visit and the experience. Exemplify.	Not recommended for large groups. It needs specialised staff and volunteers.

Support materials

The way to apply this methodology is through workshops. These workshops must be given by an HI specialist and will be adapted to the interpretive media to be generated. The duration of the workshops is from 8 to 16 hours.

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Ecomuseum evaluation and impacts monitoring

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ECOMUSEUM EVALUATION AND IMPACTS MONITORING



Expected stage of the ecomuseum
Already developed ecomuseum,
Ecomuseum in progress



Target people
Community members, Ecomuseum staff



Implementation time
1-3 months

Description of the tool

External evaluation

Many Italian Regions approved laws about ecomuseums but few of them evaluated ecomuseums performances and non-monitored impacts. Recently, in some regions such as Lombardia and Piemonte, the second generation of legislation has come into force. It is contributing to shaping the so-called Italian ecomuseums 2.0.

The common issues emerging from the new laws are the role of ecomuseums in the care, management, enhancement and preservation of living heritage and landscape with community engagement and the need for a system to monitor the achieved results and the maintenance of the law's minimum requirements.

Nowaday periodic monitoring and training activities are provided only in some Regions and Provinces such Lombardy and Puglia, but the recent law in the Piedmont Region provided a periodic monitoring.

Lombardia region evaluated ecomuseums both with a questionnaire ([link](#)) and through on-site visits. The new requirements for Lombardy ecomuseums also ask about monitoring cultural impacts.

The Network of Lombard ecomuseums approved the [Vademecum for ecomuseums 2.0](#) that is a document that the Network makes available to all ecomuseums for the explanation and deepening of the minimum requirements for the recognition of ecomuseums in Lombardy.

Self (internal) evaluation

According to De Varine, evaluation appears not only as a legitimate condition for the awarding and maintenance of the "ecomuseum" label, but also and perhaps above all as a way of constantly improving the quality of methods and confirming the reality of social utility of each ecomuseum.

The ecomuseum process requires a critical follow-up as permanent as possible, which should be carried out voluntarily by its actors themselves, preferably accompanied by an outsider. De Varine proposed a collective work of self-examination which should lead to a consensual improvement of the objectives, methods and programs. It is not a question of producing quantitative results or supposedly "objective" statistics. It is also in a way a process of self-training for the people who are most involved in the life of the ecomuseum and who often have not received any specific professional qualification. Italian ecomuseums, and in particular those in Piedmont, have already been the subject of reflection and experimentation on this theme on several occasions. De Varine in 2015, tried a theoretical approach, at the request of the ecomuseums of Lombardy. Any self-assessment must be decided, designed and carried out by the people who take the initiative, and this as much as possible in a collective and contradictory way, in order to reach decisions by consensus.

Guidelines to apply the tool

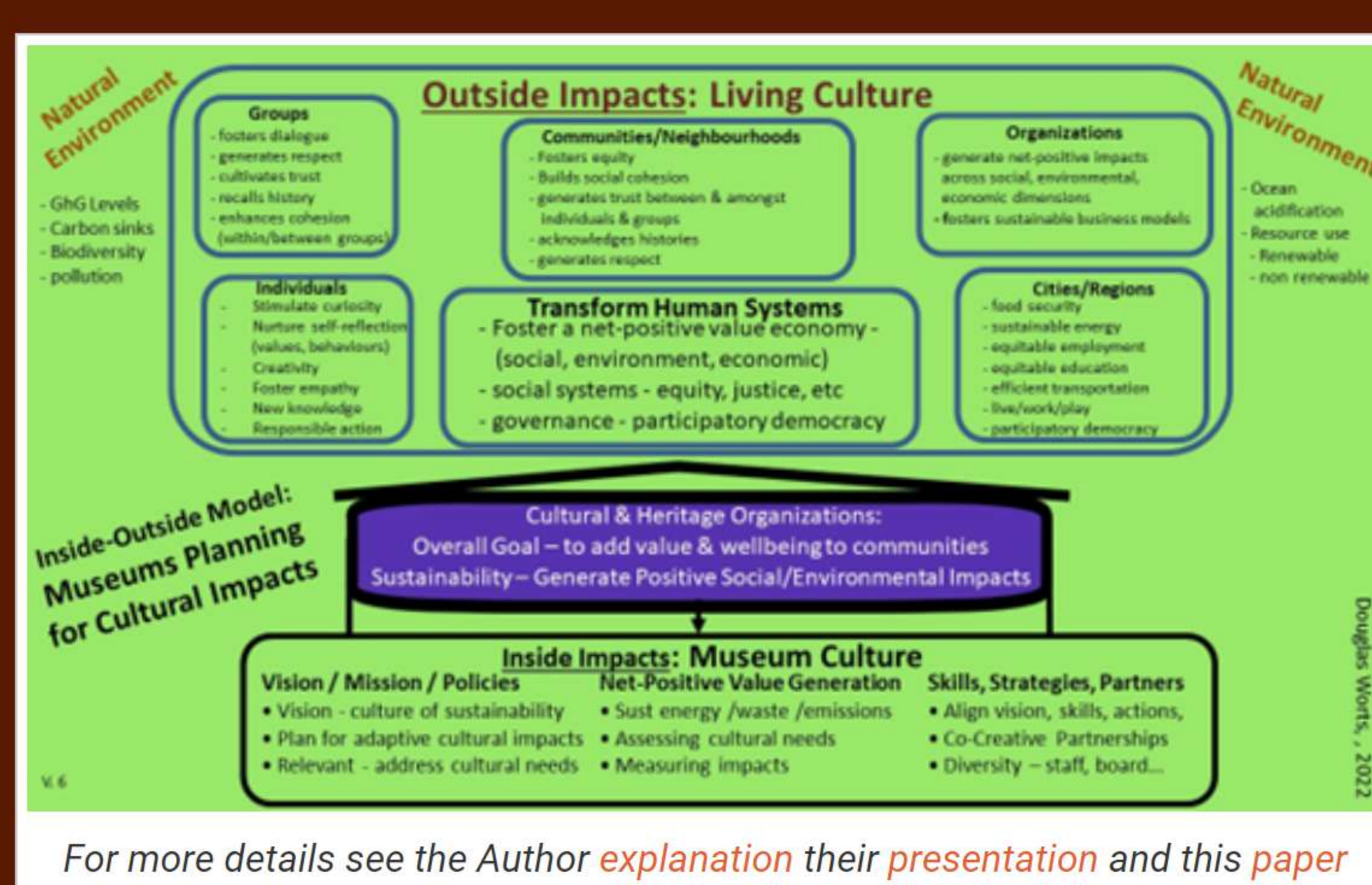
The self evaluation table proposed by De Varine attempts to respond to three issues of any ecomuseum that I believe should be addressed separately:

- **Evaluation of the structure itself:** an ecomuseum is not an ordinary institution, its parameters can, and often must, evolve: the territory, the demography, the very concept of heritage, the human and material means, the passage of generations, the main and secondary objectives, explicit and implicit, the modalities of participation, sometimes also the legal status, as many elements as is appropriate to reformulate and question periodically, in order to ensure the sustainability of the ecomuseum.
- **Evaluation of the impact on the community,** which will allow a measurement of the social utility of the ecomuseum: the management of the heritage is not the only function of the ecomuseum and it is not only the effect produced on the heritage that must be examined and measured, but the impact on all the dimensions of local development in a dynamic way, that is to say by accompanying the endogenous and exogenous changes which affect the territory and the community. We suggest evaluating ecomuseum impacts also through the Inside-Outside Impact Model by Douglas Worts. This is a way to link a vast range of possible public engagement strategies related to climate change action that can have impacts both inside and outside heritage organizations.
- **Evaluation of the ecomuseum process and the methods used,** in order to constantly improve the effectiveness of the action in its various forms: modalities of participation.

Support materials

The De Varine's table of self evaluation of impacts was presented at the 2019 conference by Piemonte Region about ecomuseums ([read more in french](#); see the [table of evaluation](#))

The Inside-Outside Impact Model by Douglas Worts:



For more details see the [Author explanation](#) their [presentation](#) and this [paper](#)

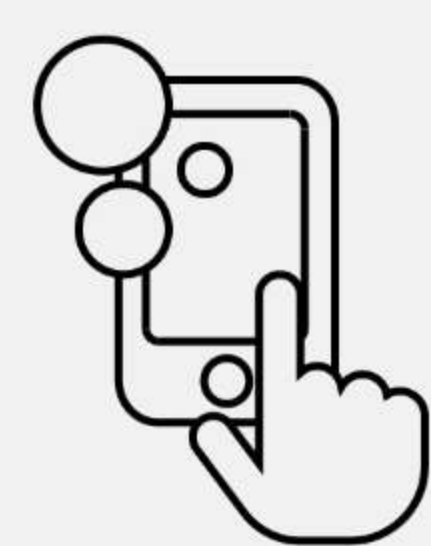
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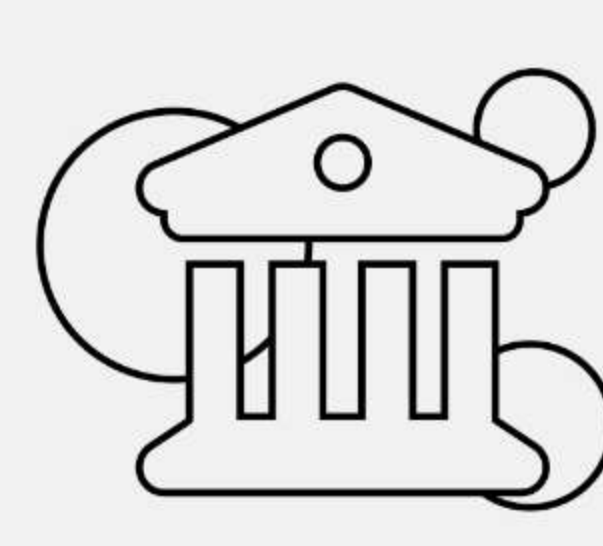
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Participatory - Action - Research

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PARTICIPATORY - ACTION - RESEARCH



Expected stage of the ecomuseum

Already developed ecomuseum, Early stage of ecomuseum development, Ecomuseum in progress, Preliminary stage of ecomuseum development



Target people

Authorities, Community members, Institutions, Stakeholders, Organizations, Representatives of local community, Stakeholders

Description of the tool

Participatory - Action - Research (PAR) is a tool whose objective is to enhance the participation and collaboration of community members in actions aimed at transforming the community. This implies that people must be an active part of all intervention processes, as well as in decision-making (Montenegro, 2004: 20).

PAR emerged in the 1980s as a critique of the limited channels for social participation and decision-making on issues and needs that directly concerned them (civil rights, social justice, inequalities, etc.). This critique also extended to the academic and institutional environment where social phenomena and communities were taken as objects of study, but not as participatory subjects when it came to researching them and seeking solutions.

This type of research aims to take into account social needs and problems, but whose actions are carried out by citizen initiative. Its methodological and theoretical roots are to be found in the pedagogical processes of Paulo Freire, in the militant sociology of Orlando FalsBorda, in community development and in the Critical Culture of the New Museology and Sociomuseology presuppositions.

Characteristics:

The main features of this methodology are:

- The whole community, each citizen, has a responsibility for his or her territory, heritage and future. This awareness of responsibility is one of the elements that Hugues de Varine pointed out as fundamental to the creation of ecomuseums.
- The purpose is to bring about the transformation of a reality, be it cultural, social or economic.
- It arises as a result of needs or problems detected by a group or citizens of the community. It is the "spark" (detonator) that authors such as Mayrand or de Varine pointed to as triggers for community mobilisation.
- It starts from the concrete social reality of the participants of the process themselves. This implies a holistic view (historical and contextual) in which the research depends on the particularities of each situation and place.
- Popular participation must be part of the whole process, accompanied by a model of horizontal relations, thus breaking the relationship of intellectual dependence; it therefore demands a change in interpersonal and inter-institutional relations from technicians and professionals.

Objectives:

Taking into account the purpose of the RAP and its characteristics, the objectives it pursues are:

- Reflecting and researching on social history and promoting transversality among the population and technicians to create a Critical Culture.
- Encourage the inclusion of the population as co-researchers.
- Develop leadership skills, innovation and social commitment to respond to the needs and demands of the community.
- Use appropriate methods and strategies in the search for comprehensive solutions to community problems.
- Stimulates self-management initiatives.
- Create new forms of social organisation.

Guidelines to apply the tool

PAR process:

First step. Diagnosis.

Knowledge of the territory, its problems and needs, based on existing documentation and interviews with institutional and associative representatives. This preliminary phase involves:

- Meeting with local administrations and representatives, associations and groups, citizens, etc.
- Programming a preliminary investigation in PEST format.
- Identification of interest groups for the setting up of committees or working groups.
- Start of fieldwork (individual and collective interviews with institutional representatives, associations, groups, etc.).
- Preparation of a preliminary report.

Second step:

- Constitution of a team composed of technicians and members of the community.
- Carrying out a situational diagnosis. Investigating the community's networks and actions, its problems, needs and strengths. For this, different forms of data collection are used (e.g. interviews, focus groups, SWOT analysis, etc.). The result will be the mapping of the priority elements and axes for the community and the networks of partners to address them.

Third step:

- Action planning. With the research carried out, specific programmes and actions will be generated, and the social, cultural and economic problems and needs to be tackled in the short, medium and long term, their timing, the agents involved and the necessary resources will be decided.

Fourth step:

Implementation of programmes and planned actions. The entire RAP programme must lead to an autonomy of the communities in decision-making and self-governance, or at least in the generation of a critical culture that allows them to be aware of their social, territorial and patrimonial reality.

Support materials

In order to be able to develop the different phases, some PAR techniques are:

Situational diagnosis. This is carried out by means of a PEST and SWOT analysis.

Participatory mapping. These are tools to locate, in a shared and collaborative way, spaces and heritages that are identity and with which to work on the future of the territory and the community.

Social maps and sociograms. These are maps that visualise neighbourhood collectives and associations, their interactions and networks of knowledge and work. Sociograms aim to graphically represent the degree of relations between the different entities (institutional, civil, etc.) and the direction of these relations, i.e. unidirectional or bidirectional.

Number of participants: this toolkit focuses on community work, so its success will depend on the participation of a representative part of the community population.

Materials: this Toolkit can be developed both in open-air public spaces (squares, parks, etc.) and in closed spaces (schools, cultural centers, etc.). the necessary material will depend on the methodology used and the economic resources available.

Technical team: it is convenient that there is at least one person specialized in PAR or in social and community work.

Online resources

- [PAR definition and process](#)
- [PAR methodologies](#)
- [Tool to create sociograms](#)

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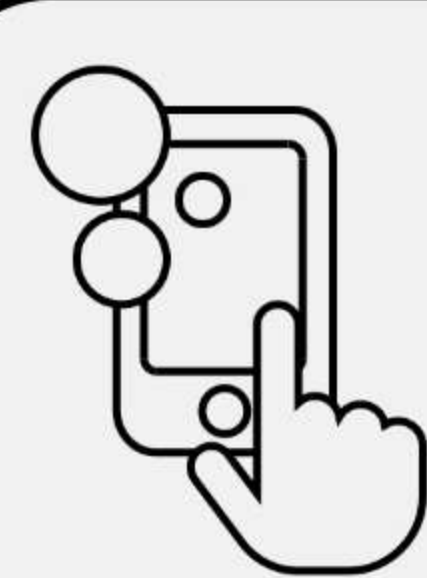
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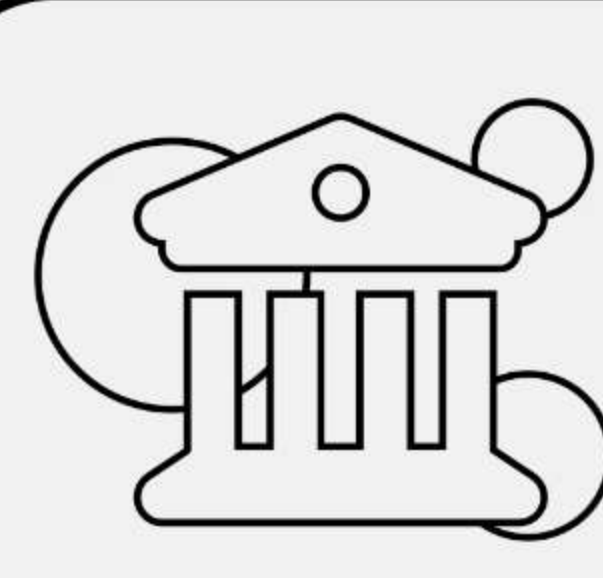
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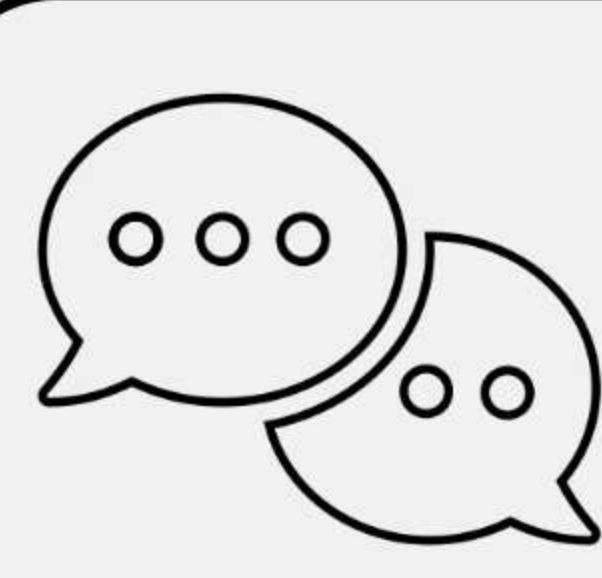
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COMMUNITY MUSEOGRAPHY



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COMMUNITY MUSEOGRAPHY



Expected stage of the ecomuseum

Early stage of ecomuseum development, Ecomuseum in progress, Preliminary stage of ecomuseum development



Target people

Community members, Museography and participatory and community work, Technicians and specialists in museology

Description of the tool

Museography is (...) defined as the practical or applied aspect of museology, i.e. the set of techniques developed to carry out museum functions, particularly those concerning the museum's layout, conservation, restoration, security and exhibition" (Desvallées and Mairesse, 2010).

The tool presented here will focus on the part of the exhibition set-up. The exhibition is the element that has marked part of the historical evolution of the contemporary museum. It has gone from being concerned with collections as a fetish to being concerned with heritage assets as the institution's communicational axis. The exhibition, through museography, is the tool for interaction, visibility and identity of the image that emanates from the museum. The New Museology made it clear that the exhibition – like the museum itself – should be conceived as a means and not as an end. The exhibition would become the essential instrument for the presentation of heritage, investigating new languages and museographic techniques. This metamorphosis was not limited to the search for new exhibition languages, museographic media or narratives, but also to the involvement of the public in the elaboration of the museum scripts and museum montages.

With a view to the creation of ecomuseums, the exhibition has positioned itself as one of the most useful methods of heritage appropriation and dialogue between the community and the technical-specialists. Through the exhibition, the process of community action is initiated, leading to heritage awareness and the construction of an identity through which the community becomes involved in making decisions about its future and that of its territory. In conclusion, the (community) museum space becomes a social and cultural laboratory.

Characteristics

The main characteristics of community museography are:

- Every exhibition (museographic) action must be associated with a public(s) in the community.
- The exhibition is a way of giving a voice to the community: its memory, its toponymy, its needs and problems, its territory, etc.
- Every exhibition should be a tool of global pedagogy (Freire, 1990) insofar as it serves, urges and generates a critical culture (Rivard, 1987).
- Every exhibition is not an end, but a means of communication and dialogue with and for the community.

Objectives

The main objectives of this tool are:

- Generate multidisciplinary teams between specialists and members of the community.
- Create museum spaces in the territory that are designed and implemented by the community.
- Research on heritage assets and the different voices (narratives) that can be constructed about them.
- Involve the population in the creation and management of an ecomuseum through the establishment of museum spaces.

Guidelines to apply the tool

An exhibition is a knowledge and communication strategy that, from a community perspective, is a method of sharing, collaborating and engaging with community members. It should, therefore, generate more questions, queries and dialogue than answers and closed narratives.

The exhibition project:

First step

The promoter team must establish the first parameters of what the museographic intervention will be. In this case, they can be summarised by answering two essential questions: What do we want to make visible and what do we want to do it for? These questions will serve to establish the main objective and theme of the exhibition and its purpose. The purpose of community museography is to address the needs, problems and concerns of the community.

Second step

In the second phase, a multidisciplinary team will be formed according to the pre-established objective and theme. It is essential that members of the community are involved in this team.

The working team will draw up a draft museum script to establish the main elements of the research (objectives, resources, timetable, etc.).

Third step

In this phase, the research work and the writing of the final project will be carried out:

1. The research work must be carried out in three areas: (1) documentary and academic work, (2) field work in the territory, (3) work with the community.
2. The drafting of the project must include all the technical aspects for its execution (equipment, type of exhibition, resources, timetable, didactics, etc.).

Fourth step

The last phase is the implementation and evaluation of the exhibition. It should not be forgotten that this is a participatory process, so both in the design (step 3) and in the execution (step 4) there must be a collaborative process where the community is the protagonist.

Support materials

The museographic installation depends on the resources available to the community. Depending on these, interpretative and museographic means of different magnitude can be designed. However, it should be remembered that in community museography it is not the number of courses that are relevant, but the participation of the community, so it is always a priority to bear in mind the first phases of any museographic project: what is it going to be done for? And with which members of the community is it going to be developed?

Number of participants: this toolkit focuses on community work, so its success will depend on the participation of a representative part of the community population.

Materials: for the development of this toolkit an exhibition space is necessary. This space must be adaptable to the needs of the museum script. Diaphanous and modular spaces are recommended.

The necessary economic resources will depend on the possibilities of the institution, local government, association, etc. However, it must be taken into account that a minimum of materials will be necessary, such as: showcases, bases, DIY and hardware materials, etc.

Technical team: it is convenient for the work team to have specialist personnel in museography, heritage interpretation, design, etc.

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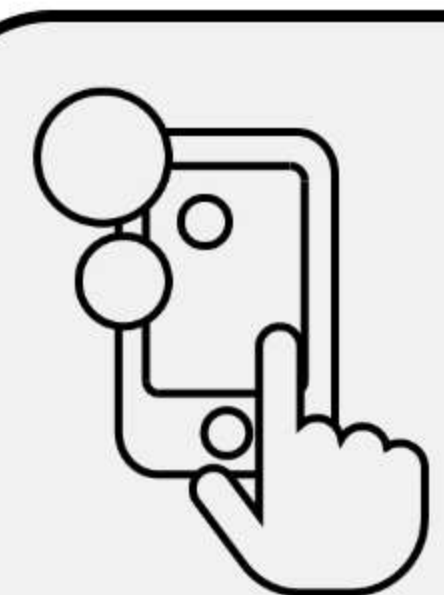
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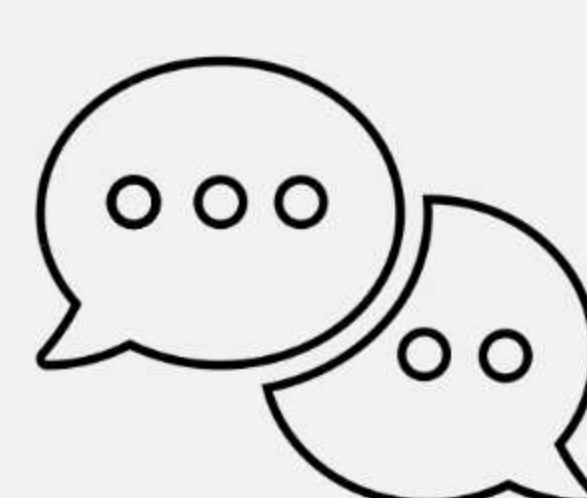
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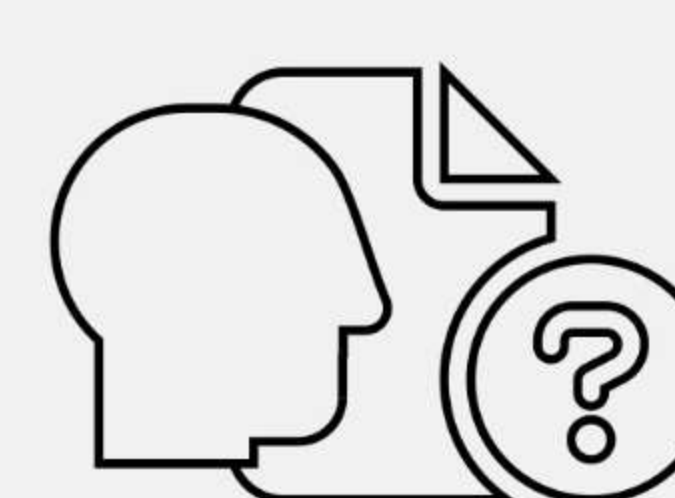
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ORAL MEMORY WORKSHOPS



QUESTING

Oral Memory Workshops

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ORAL MEMORY WORKSHOPS



Expected stage of the ecomuseum

Already developed ecomuseum, Community with intention to start an ecomuseum, Early stage of ecomuseum development, Ecomuseum in progress, Preliminary stage of ecomuseum development

Usefulness of this tool

This tool can be used to

- Contribute to the planning and management of the heritage resources of a community and a territory from a public perspective.
- To help generate physical and digital educational and cultural materials on the rich heritage of the community's territory.
- To enrich the heritage discourse of a territory by exploring the sphere of unofficial discourses through the memory of citizens.
- To recover knowledge about different types of heritage assets once existing in a territory and already lost in material terms but preserved in the memory of the citizens of that territory.
- To investigate and value the spaces of cultural and heritage memory of the citizens of a territory.
- Contribute to involving the citizens of a territory in the enhancement of its territory and heritage.
- To enhance the value of particular narratives, discourses and memories, without excluding collective ones, about the territory and its heritage assets.

Description of the tool

Oral memory workshops are spaces for contrast and debate and they are also frameworks for the construction of collective identity through the exercise of oral memory, especially thanks to the senior members of the community. Conceived as a space to share knowledge through the experience of the components of the community, these workshops will serve to recover and value, from a participatory perspective, the direct knowledge of the members of the community group.

This will have a positive impact on the task of revitalizing the ecomuseum, incorporating into its action dynamics the knowledge stored by the members of the community to which the ecomuseum belongs.

Objectives

The workshops or seminars on oral memory have a multiple objective

- Recover and enhance the memory of a specific group in relation to the history and heritage of its region as geographical and cultural space.
- To value the identity of this group with respect to itself, contributing to improving the social and cultural self-esteem of the citizens by recognising the values of its memory and its heritage experience as a group.
- Preserving the cultural and heritage memory of a community in order to preserve it for future generations.
- In line with the above, to convert the experience and heritage memory of a collective into a social, cultural and educational value among the youngest, making this heritage memory and educational value likely to be enjoyed by the general public and especially by the school segment of the community.
- To encourage curiosity and interest in the members of the community in their own history and in the values of their heritage.

Guidelines to apply the tool

To have human elements that know their territory, their present and past reality, focusing the action on people of a certain age who can be assumed or who are known to have this knowledge.

- Meeting with local actors and scheduling of a preliminary investigation
- Identification of potential stakeholders and interest groups
- Fieldwork; conducting (if possible) individual interviews with potential workshop participants
- Formation of the working groups in the workshops (minimum recommended: three community members per workshop, plus the external rapporteur).
- Development of the workshops (they can be recorded with audio-visual means if the participants agree; it is preferable to carry them out in person, in order to encourage the interaction of the participants, but without excluding the use of a virtual or semi-virtual format).
- Drafting of the specific reports and conclusions of the workshops
- Elaboration of an overall concluding document of the workshops.

The preferred target is the one formed by the oldest members of the community, since it is especially about working with the treasure that constitutes the memory of the senior members of said human group. This tool can be applied at any level of the existence of the ecomuseum, either in its project phase or in an existing and consolidated ecomuseum, since the joint work with Memory and heritage is an always valid tool both in the conformation of the project of an ecomuseum as it is regarding an already existing ecomuseum.

Support materials

This methodology should be implemented through the development of workshops. These workshops should preferably be coordinated by a specialist in memory and orality, an expert in oral history, and should be adapted to the human resources who wish to take part in them, as they may involve older people to a large extent.

A flexible duration of the workshops is recommended, starting from a minimum of 2 hours for each workshop. They can take place in person or virtually, the former being recommended. They can be collected using audiovisual media with the consent and permission of the participants.

The production of final audiovisual documents specific to each workshop and a similar general document is not excluded.

References

- Oral memory workshops in La Línea de la Concepción (Cádiz, Spain)
- Oral memory workshops in Marinilla (Antioquia, Colombia)
- Oral Memory Workshops, University of Las Palmas (Canary Islands, Spain)
- Oral memory workshops at the Cervera Regional Museum (Catalonia, Spain)
- Oral memory experience in Belalcázar (Córdoba, Spain)
- https://www.facebook.com/1437582349824579/videos/382712939697951/?__so__=permalink

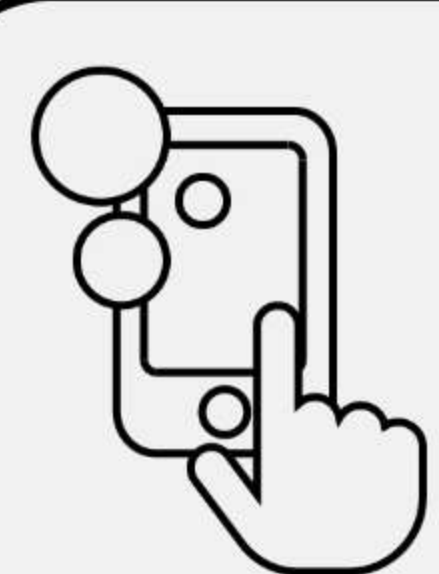
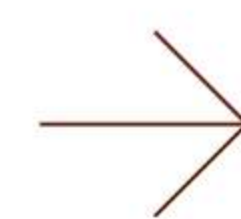
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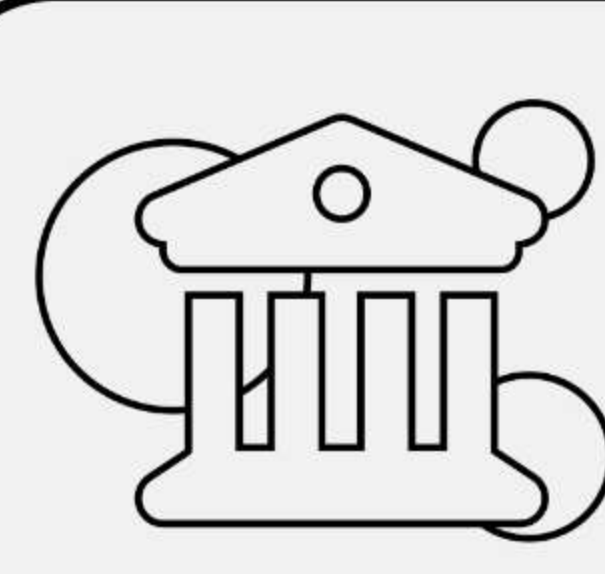
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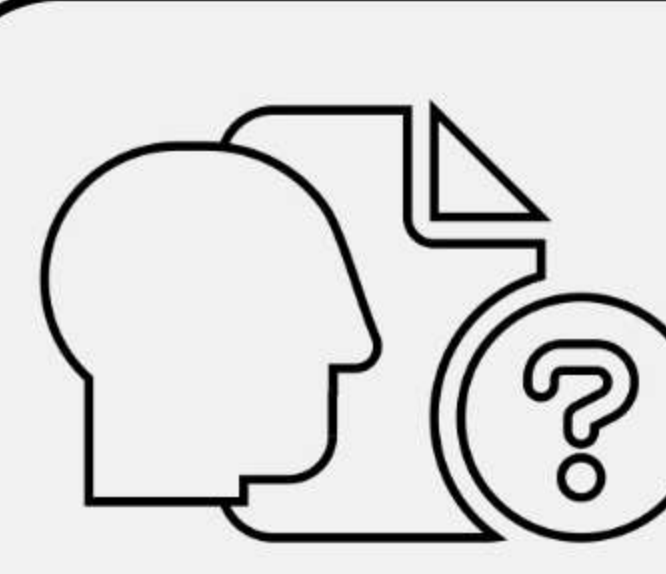
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QUESTING



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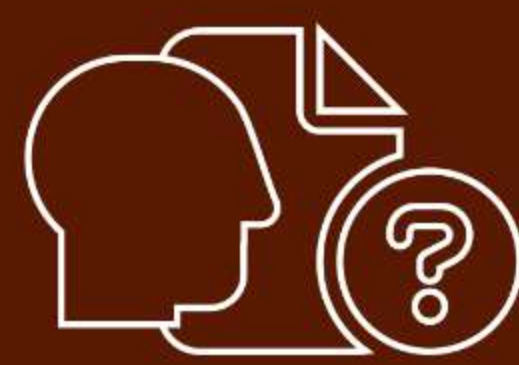
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QUESTING



Expected stage of the ecomuseum

Already developed ecomuseum, Community with intention to start an ecomuseum, Early stage of ecomuseum development, Ecomuseum in progress, Preliminary stage of ecomuseum development



Target people

Institutions, NGO, Representatives of local community

Description of the tool

Introduction to the method is making general heritage inventory (all aspects and elements are taken into account) of a place, where a quest will be developed. Then one specific area of heritage is analyzed in details (e.g. a custom, architecture, craft, legends, local history, local personality). Usually, it refers to a small community like a village, town or its part, but it can also be located inside (in a museum, gallery). It requires deepening the knowledge in the selected particular area and a narration is built in the form of a poem. Ultimately, a treasure hunt game is created. The effect is important but at the same time the participative process and dialogue is significant. The method can be used in any stage of ecomuseum development – in early stage it can contribute to dialogue concerning local values, in more advanced ones it can enable to create educational tools that can be part of ecomuseum educational program.

Guidelines to apply the tool

It can be used anywhere in a limited space (up 2 hours walking or biking distance).

It is carried out by means of a workshop (usually 2 days) and on-line cooperation after the workshop.

Target group: representatives of a local community, NGO, local nature and heritage lovers, culture institutions, youth, seniors etc. (15 to 20 people).

- 1. Identification of local natural, historical and cultural heritage resources** (tangible and intangible) by means of a brainstorm. All kind of local curiosities, anecdote, oral stories could be included.
- 2. Selection of the main motive:** e.g. architecture style, legends, local personality, local traditional craft, nature, a palace with a surrounding park, important local family, historical event or period, a battle. It can also be a story about the most important/interesting heritage of the place. The quest will focus on a chosen thematic motive.
- 3. Selection of places/sites to make a trail.** A trail is not marked in any way and runs in a place following the narration based on a selected topic. At the end there should be designed a place to hide the treasure. After the draft designing the trail, participants take a trial walk to verify if anything is not missing and to decide where to hide the treasure.
- 4. Writing the story in a form of a poem.** Participants are divided into smaller groups and the trail is divided into sections. Each smaller group is responsible for writing part of the story concerning assigned section. The narration includes: story, instruction how to move along the trail and clues. Finding clues' solutions allows to discover the password to the treasure. Clues are based on specific features, architectural details, inscriptions (e.g. on boards, monuments, buildings) that are relevant to the story. If not all story parts are ready or they still need more elaboration, participants get some extra time after workshop to improve their texts. At the same time volunteers prepare illustrations and a rubber stamp that is hidden as a treasure (to put it on a leaflet as an evidence of completing the quest).
- 5. Editing the story.** Usually story needs to be "smoothed out" and edited to make a good piece of a rhymed narration with good, guessable clues. Before dissemination it is tested and verified.
- 6. The final effect:** leaflet. The leaflet is designed including the whole quest text, hand-made illustrations and empty space to get a stamp. Names of text and illustrations authors are put on the leaflet.
- 7. Outcomes.** Benefits of making quests lie not only in the final product – the leaflet that enables discovering the place following the poem. Process is not less important than product in the questing methodology: discussion concerning the heritage, special values of places, events, people, stories etc. It is a very involving method and people feel responsible and proud of the common heritage and work. Both the process and product have high educational values.

Support materials

Presentation concerning questing methodology

Examples of quests

Clark D., S. Glazer, Questing. A Guide to Creating Community Treasure Hunts, University Press of New England, Hanover and London 2004.

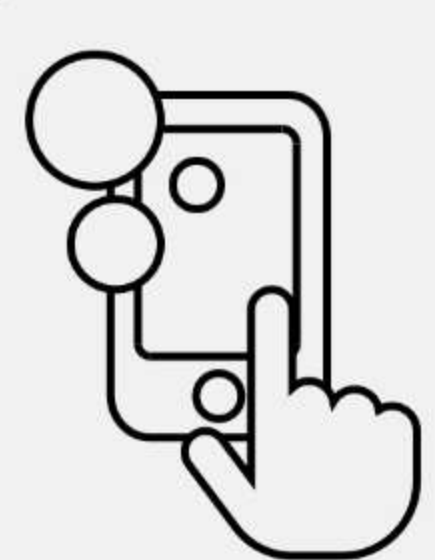
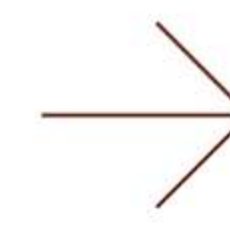
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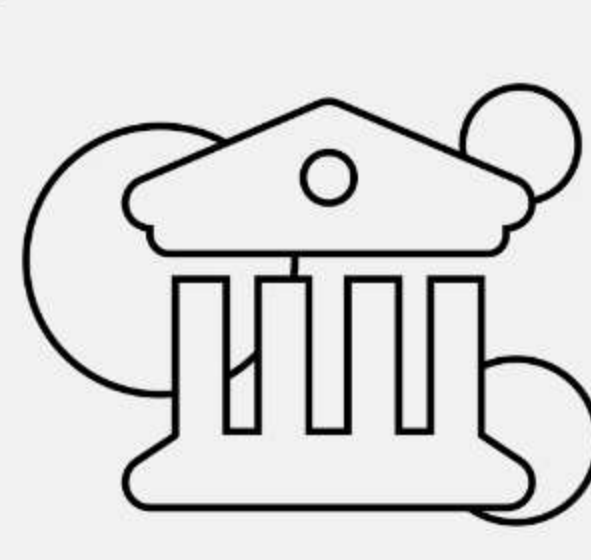
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