

HOW MUSEUM DOCENTS DEVELOP EXPERTISE

by

ROBIN SANKOWSKI GRENIER

(Under the Direction of Sharan B. Merriam)

ABSTRACT

The purpose of this study was to examine the nature of docent expertise. To achieve this purpose, the following questions guided the research: 1) What are the characteristics that define an expert docent? 2) What types of learning experiences lead to the development of expertise? 3) How does the museum context shape docent learning? and 4) What is the process for becoming an expert docent?

A qualitative research approach was employed. In-depth interviews were conducted with twelve participants to obtain data on how museum docents learned their craft and developed expertise. A purposeful sampling of four historically themed museums that provide docent lead tours to visitors was conducted. The sample included the Abigail Adams Historical Society and Birthplace, the Atlanta History Center, the U.S. Holocaust Memorial Museum and Boston By Foot. All participants were docents with at least three years of museum experience in leading group tours or programs. The primary data sources for this qualitative study were in-depth interviews with open-ended questions and supporting data from observation, and documents to provide a contextual frame.

Analysis revealed that the characteristics of expert docents can be categorized as facilitating learning, which includes communicating information, reading and adapting to the audience, and knowledge of the subject matter, as well as the categories of integrating prior experience, demonstrating enthusiasm and commitment, and maintaining a sense of humor. An

analysis of the findings also addressed the types of learning experiences that lead to the development of expertise in docents and included formal training and continuing education and informal and incidental learning. The third category of findings examined the role of context in shaping docent learning through physical, emotional, and social influences. Finally, analysis of the last set of findings relates to the nature of expertise development, which is illustrated through a cyclical process of phases: Dependence, Growing Independence, and Transcendence.

Based on the findings the following conclusions were drawn from the study: docent expertise is a combination of acquired and preexisting characteristics; the nature of expertise is cyclical and fluid; and context is integral to docent learning, as well as expertise development and re-development.

INDEX WORDS: Expert, Expertise, Museum, Docent, Tour Guide, Volunteer, Adult Education, Adult Learning

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ROBIN SANKOWSKI GRENIER

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M.A., The University of South Florida, 2001

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ROBIN SANKOWSKI GRENIER

Major Professor: Sharan B. Merriam

Committee: Laura Bierema
 Ronald Cervero
 Carole Henry

Electronic Version Approved:

Maureen Grasso
Dean of the Graduate School
The University of Georgia
May2005

DEDICATION

To my daughter Catherine, with all my love.

It is better to shoot for the moon and miss, than shoot for nothing and hit it.

ACKNOWLEDGEMENTS

You know, if I had my druthers I would re-title this page, because acknowledging these individuals is simply not enough, but I want to play by the rules of the dissertation gods and appease them when necessary, so we'll go with their title. I suppose I could just thank everyone I have ever met, since it seems that every step I have taken from birth till now has lead me to this point, but that might be a bit too much. Instead, a blanket thank you to all and specific appreciation to certain mentors, friends, and family, who have moved my fingers to make the words of this dissertation.

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behind me when I need a good shove and I love him. I have completed this dissertation and you would not be reading it if he hadn't been a part of my life.

My final thought is a gentle reminder to myself, because I will open this on occasion and I'll need to read these lyrics by Toby Keith:

“Under a old brass paper weight is my list of things to do today. Go to the bank and the hardware store put a new lock on the cellar door. I cross 'em off as I get 'em done, but when the sun is set there's still more than a few things left I haven't got to yet.

Go for a walk, say a little prayer, take a deep breath of the mountain air, put on my glove, play some catch. It's time that I make time for that. Wade to shore, cast a line, look up an old lost friend of mine. Sit on the porch, and give my guy a kiss. Start living, that's the next thing on my list.

Raise a little hell, laugh till it hurts, put an extra five in the plate at church. Call up my folks, just to chat. It's time that I make time for that. Stay up late, then oversleep. Show him what he means to me. Catch up on all the things I've always missed. Just start living, that's the next thing on my list.”

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CHAPTER 1

INTRODUCTION

The evolution of the modern museum has been a long process, beginning with private collections seldom seen by the general public (Alexander, 1993). In the late 1800s in the United States museums began to resemble the traditional image many people have of a hushed art gallery or a building housing objects and relics of the past secured by glass and ropes. Today, this perception has been replaced with unique experiences incorporating interactive exhibits, hands on learning and entertainment opportunities, and historical reenactments by professional interpreters. As museums change, so does their function in the community.

The functions of these institutions vary as much as the content in their collections. Perry, Roberts, Morrissey, and Silverman (2000) address this evolution of museum function by noting that, “once defined primarily in terms of their collections, museums are now collections-based only as far as their collections serve people – through research education, stewardship, and more” (pp. 43-44). They go on to state that this means that for museums how they relate to and serve their visitors is as important as how objects are preserved and displayed. This is further exemplified by Carr (2003) who notes that cultural institutions, such as museums, serve the function of “*minding* the community” and that museums are “the unspoken, continuous, unfinished parts of ourselves, and the mindful emblems of our communal intellectual strengths” (p. 59).

As Carr’s (2003) notion of museums demonstrates, museums are no longer simply artifacts on display or constructions of past lives, and with a need to address the changing role and image of these institutions, scholars offer diverse and wide-ranging definitions.

In the broadest sense, Falk and Dierking (2000) define museums as institutions including “art, history, and natural history museums; science centers; historic homes; living history farms and forts; aquariums; zoos; arboretums; botanical gardens; and nature centers” (p. xi). According to the American Association of Museums’ (AAM) website, www.aam-us.org, the U.S. government defines a museum in the Museum and Library Services Act as being “A public or private nonprofit agency or institution organized on a permanent basis for essentially educational or aesthetic purposes, which, utilizing a professional staff, owns or utilizes tangible objects, cares for them, and exhibits them to the public on a regular basis.” Lastly, the International Council of Museums (ICOM) on their website, www.icom.museum, defines museum as “A nonprofit making, permanent institution in the service of society and of its development, and open to the public, which acquires, conserves, researches, communicates and exhibits, for purposes of study, education and enjoyment, material evidence of people and their environment.” Given the varied definition of today’s museums, museum staff and administration are challenged to define their role in their community and with their visitors.

With the range of institutions that are today considered museums, and the development of new definitions and functions, the educational role of these institutions is often difficult to encompass into a single idea. Instead, groups such as the American Association of Museums’ Task Force on Museum Education, in their 1992 landmark report offer a broad and somewhat idealistic notion of museum education (*Excellence and Equity: Education and the Public Dimension of Museums*):

Museums perform their most fruitful public service by providing an educational experience in the broadest sense: by fostering the ability to live productively in a

pluralistic society and to contribute to the resolution of the challenges we face as global citizens. (p. 6)

Those in the field of museum and visitor studies see this broad definition in relation to the connection between visitors and their learning and this connection is reflected in the literature (Ault & et al., 1985; Balfe, 1987; Chadwick, 1995; Cohen, 1989; Falk & Dierking, 2000; Gray & Chadwick, 2001; Hein & Alexander, 1998). This notion of museum education being defined in terms of the visitor is supported by Falk and Dierking (1995) who outline that today, museums:

1. Provide visitors with content and ideas that are accessible, and facilitate connections that bring together contrasting facts and ideas;
2. Affect visitor values and attitudes;
3. Promote culture, community, and familial identity;
4. Encourage a visitors' confidence and motivation to gain new knowledge and promote interest and curiosity; and
5. Impact how visitors think and view their worlds.

Additionally, Falk and Dierking (1995) state that museums are viewed as environments that encourage active participation and exploration, as well as serving as facilitators accountable for creating environments where this form of active learning can occur and positive visitor outcomes can be attained.

Museums have long held a place within the field of adult education as a context for providing adult education opportunities to visitors. The role of museums in adult education has been addressed as early as the 1920's and in almost all of the handbooks of adult and continuing education. From an adult education perspective, museums cater to

visitors for short periods of time, utilizing gallery labels, docents, printed materials, and technology to share information (Chobot, 1989). Additionally, museums serve as a source of adult continuing education programs, including traditional strategies such as guided tours, classes, film, and specialized programming through outreach to specific audiences (Chobot & Chobot, 1990).

One significant aspect of adult education in museums is the docent. While there are many terms for individuals responsible for teaching in museums, including tour guide, museum teacher, and interpreter, I use the term docent to refer to those persons who teach or facilitate face-to-face programs in varied settings broadly defined as museums. These docents, who are often volunteers, require a grasp of their subject matter, as well as an understanding of communication skills for a variety of audiences. These individuals are themselves adult learners, while often serving as adult educators to museum visitors. It is evident that the learning and educational function of museums is expanding and yet, little is understood about these individuals who assist in museum visitors' learning. If museums are to continue on their path of placing education at the forefront of the institutional mission, more significance must be placed on the role of docents and how they contribute to museums and impact the visitor experience.

The notion of a museum docent began in the early part of the 1900's. As the function of the museum evolved, the demand for educational and audience programs increased, requiring a need for qualified docents. This educational service while maintaining some general responsibilities across all museums, can take on a very different look and role depending on the context of the cultural institution. Today docents can be found leading tours through art galleries, acting as role players in living

history museums, demonstrating experiments in a science center, or helping visitors excavate a field as part of an archeological dig sponsored by a university museum. Their responsibilities are endless and vital.

Scott-Foss (1994) states that docents form a bridge between the museum object and the visitor, making the work of docents critical to the success of U.S. museums. This is supported by Grinder and McCoy (1985) who note that docent-guided tours are the most widely used educational service in today's museums. Falk and Dierking (2000) also acknowledge that museum staff, including docents have a positive influence on the experiences of visitors, especially if these individuals are well trained. Given the presumed importance of these individuals in the success of museums, it would seem that there would be significant literature regarding docent practices; unfortunately, even basic information such as demographics is dated, limited, or simply does not exist.

Docent training literature is underrepresented in the field of museum studies or tends to be impressionistic. As Scott-Foss (1994) notes, "literature devoted to selecting, training, and evaluating docents provides more personal impressions rather than empirical data" (p.20). One reason for this lack of literature may be a result of museum educators drawing from outside the field to find resources about training docents. Literature from human resource development, adult education, and even K-12 pedagogical practices substitutes for research in docent training and education.

Furthermore, while today's museums recognize and even tout their educational role, the academic preparation of those planning to work in museums is often focused on content. Museum staff are often graduates with degrees in art,

art history, and history. Schouten (1987) found that in large museums museum educators are generally academically trained, and as a result have extensive knowledge of subject matter and objects, but little knowledge of learning strategies. All of this leads to museum educators rich in knowledge about their museum content, but often ill-prepared to train docents in areas of content delivery and learning theory.

Training for docents varies from museum to museum, ranging from docents being provided with a list of recommended readings to programs involving extensive classroom training, shadowing, and on the job training. Cooper Fleck's (2001) study of paleontology museum volunteers finds that "when asked about the type of training they [museum volunteers] found the most helpful or meaningful, fifty-seven percent of the resulting comments related to informal training methods, such as hands-on, one-on-one, on-the-job training and field trips" (p. 168). Additionally, Scott-Foss (1994) contends that docent education should support opportunities for "interactive dialogue that focuses on problems to be solved, mysteries to be explored, and gaps in knowledge to be filled" (p. 179).

The most comprehensive examination of docent epistemology is the work of Castle (2001), whose study of museum teachers found that docents learn through a variety of informal processes including "acquisition of information on the subject; observation, or shadowing of fellow interpreters or docents; and the experience of teaching itself" (p. 321). Even with the best training programs docents are often ill equipped to share their knowledge with museum visitors. This notion is supported by Wolens, Spires, and Silverman (1986) who note that while docents are

prepared concerning objects, periods, and history, they lack knowledge of instructional strategies, learning theory, and communication skills. This lack of experience may be partially attributed to the volunteer status usually held by docents in the U.S. Although the volunteer is vital to the museum, the amount of time they are able to commit to a museum may hinder the opportunity for quality training.

Volunteer labor is a major resource, with approximately 63.8 million people volunteering in 2002 (*Volunteering in the United States*, 2003). Many museums in the U.S. rely on volunteers, and the expertise of these individuals is as crucial in these nonprofit organizations as it is in business and industry. In the context of this study, a volunteer is an individual working for a museum or similar cultural institution without receiving wages or employee benefits. Confer (1980) notes that volunteer training employs a range of techniques including lecture, discussion, and role play, but adds that there is one component unique to the training of volunteers. He states that “this element is the ceremonial effect, which refers to those parts of the training that do not aim to develop volunteers’ skills but rather to encourage their identification with the volunteer organization” (p. 70). These ceremonial activities may include appreciation events, the awarding of certificates and lapel pins, and recognition for number of hours donated or years of service. This is supported by Beck and Cable (2002) who suggest that interpreters (docents) must feel needed and appreciated.

There is little known about docent training, and in fact the literature suggests some docents receive little, if any training, yet some docents become quite effective in their educational roles. Despite limited time due to their volunteer status and despite generally inadequate training, some docents become

respected for their expertise. If docents lack comprehensive training including pedagogy, adult learning theory, and communication styles then how does one become a master docent?

An expert and related to that, expertise, are terms that have long been recognized by those in the fields of artificial intelligence (AI) and cognitive psychology and viewed in human resource development as a vital component of organizational success. Swanson (1994) describes expertise of employees as the performance fuel of the workplace. Sustaining organizational success is dependent upon, as Herling and Provo (2000) argue, employee expertise and the ability of highly knowledgeable employees to solve difficult and unique situational problems.

When studying expertise, Ericsson and Smith (1991) note that there is a need “to understand and account for what distinguishes outstanding individuals in a domain from less outstanding individuals in that domain, as well as from people in general” (p. 2). While this statement seems straightforward, a review of the literature indicates that expertise is identified in a variety of ways. Dreyfus and Dreyfus (1979) identify a five stage model of skills acquisition which includes novice, advanced beginner, competent performer, proficient performer, and finally expert. These stages are attained by passing through different perceptions of a task or problem and are represented in three areas of skill performance: (1) moving away from reliance on abstract principles to paradigms based on past experiences; (2) development from the use of relevant parts of information to a more complete picture where only certain parts are relevant to the situation; and (3) movement from a learner as a detached observer to an involved participant (Dreyfus & Dreyfus, 1986).

Additionally, Wright and Bolger (1992) provide eight characteristics of experts and Chi, Glasser, and Farr (1988a) offer seven characteristics of experts' performances. Additionally, Herling and Provo (2000) use a similar triangular display to characterize expertise to include knowledge, experience, and problem solving. Fleck (1998) details what he describes as the trialectic nature of expertise, including knowledge, power, and tradability. The idea of tradability is relatively new in the literature and refers to the social capital that an expert has at his or her disposal to get something done. An expert, for my purposes, is an individual who combines the domains of expertise: knowledge, experience, and problem solving (Herling & Provo, 2000) in the process of engaging in their craft. I will use Swanson's (1994) definition of expertise, which is "the optimal level at which a person is able and/or expected to perform within a specialized realm of human activity" (p. 94). Using these definitions provides a foundation for examining docents that may be characterized as experts because of their extensive knowledge of content related to the subject presented in their respected museums, their ability to deliver that content and knowledge, and facilitate learning by visitors.

Another area of scholarship relevant to expertise is research examining the characteristics of master teachers. A master teacher is a term often used to describe a teacher with expertise and skill and knowledge in her or his field. Characteristics of such individuals include excellent preparation, exceptional teaching strategies, the ability to communicate and motivate, a sound knowledge of the curriculum, interpersonal competence, and proficiency in classroom management (Allen, 1987). While not all the characteristics can apply directly to the work in museums, they can be modified to reflect the docent role in museums. Much like master teachers, expert or master docents would

be superior in their preparation, demonstrate excellent teaching strategies and interpersonal skills, possess the ability to effectively communicate with visitors, and have a strong grasp of the subject and museum content. A majority of docents in the U.S. are volunteers and training is adequate at best, yet some become what others would call expert or master docents. These master docents provide an opportunity to examine how they learn their craft and develop expertise.

Statement of the Problem

The number of museums in the U.S. is growing, as are the roles these cultural institutions play with visitors and the community. With this growth comes the demand for educational programming for the public that is engaging, worthwhile, and even entertaining. This demand necessitates the need for museums to call upon volunteers to serve as docents and interpreters of objects and exhibits. To meet this end, institutions must prepare docents, yet often the training is brief or insufficient for the demands of the job. If museums are to utilize docents effectively, museum educators must have a better understanding of how to address the training and developmental needs of these individuals. Even with an increasing need for understanding how docents learn their craft and gain expertise, literature in the fields of adult education, human resource development, and museum studies is lacking in this area. Regardless of whether they are professionals or volunteers, the limited research related to the education of docents is discouraging considering the crucial role docents play in many museums and cultural institutions.

Currently museum educators can draw from resources and practitioner texts to plan and carry out training programs, but little empirical data exists to support these

processes. It is important to investigate the docent learning process and the influence of things such as informal learning on docents' acquisition of knowledge and skills, communities of practice, and professional practice. Despite inconsistent training, docents become expert or master docents, yet little is known about how these individuals develop expertise.

Purpose of the Study

The purpose of this study was to examine the nature of docent expertise. The research questions that guided this study are:

- 1) What are the characteristics that define an expert docent?
- 2) What types of learning experiences lead to the development of expert docents?
- 3) How does the museum context shape docent learning?
- 4) What is the process for becoming an expert docent?

Significance of the Study

This study is significant in that it provides both practical and theoretical contributions that add to the literature in museum studies and adult education. The major significance is to provide data on the process of developing expertise in docents and how that process is impacted by the context of the museum. Beyond the focus of museum docents, the information gathered can be beneficial to multiple fields, including adult education, non-profit studies, and human resources and organizational development.

With regard to theoretical significance, the study adds to the understanding of adult learning, expertise, and museums studies. Adult learning theory is enhanced by examining issues related to the impact of context on docent learning, as well as learning

through formal and informal processes. The information gained in this study also expands current perspectives on how individuals develop expertise. By studying expert or master docents, scholars can also gain new insight into the stages of expertise from a perspective not generally addressed in the expertise literature. The focus on volunteers fills a gap in the literature and is significant to the continued study of expertise in workplace settings. The motivation of volunteers differs somewhat from paid employees and this study adds new insight into how those factors influence the development of expertise. As a result, the findings of the study present professionals in a variety of fields, as well as scholars and program and training planners, with a greater understanding of how experts learn when motivations differ.

Finally, the theoretical significance of this study benefits those in the field of museum studies. An understanding of how these docents learn and develop expertise in the context of a museum can be used to expand the limited literature in museum studies regarding the planning and implementing of training programs for museum staff. The participants may provide new ideas as they relate to the learning process of experts in these cultural institutions, and further an interest in studying the unique characteristics of these committed individuals.

With respect to the practical significance of this study, museum educators, as well as others responsible for staff development in museums may become more aware of the resources, activities, and processes actually used by master docents in their learning and development of expertise. In general, the findings can provide those in adult and continuing education with information to support their ability to effectively use their available resources in their approaches to learning for volunteers or individuals working

in non-traditional work settings. For museums, the study addresses the training and continuing education curriculum for docents. Current docent training in a museum is often created from a single, one-size-fits-all mold. Each docent is given the same materials, literature, and programming resulting in at least initially, cookie cutter docents sharing the same information in near canned presentations to visitors. By discovering how docents gain expertise, museum educators can utilize those techniques to tailor learning opportunities to meet docents' specific needs, and consequently provide better experiences for the visitors.

Furthermore, museums are charged with serving society and providing opportunities for education, entertainment, and conservation all under the label of a nonprofit organization. All of this must be accomplished in the face of budgetary concerns. Salamon (1999) found that "in the face of this budgetary pressure, nonprofit organizations have had to either reduce their services despite expanding demands, operate more efficiently, or find alternative sources of support" (p. 9). If museums are to be held accountable by their board of directors, while keeping up with technology and advancements in museology and satisfying a community's demand for more international or unique temporary exhibits, they must critically examine how monies are spent with regard to the development and training of museum staff. Docent trainings require staff hours, materials, resources, and energies of museum employees, all of which are consumed with little regard for whether or not the training is effective. Werner Karl Heisenberg, German physicist and founder of quantum mechanics once said, "An expert is someone who knows some of the worst mistakes that can be made in his subject and how to avoid them." If that's the case, with an understanding of how master docents

learn and gain expertise, the efforts and resources of the institution could be reexamined and better allocated in ways to support the development and training of all docents. By recognizing and attending to the informal learning of docents, museums can create training, education, and development strategies that are more reflective of docent needs and which are more cost-effective for museums.

Definitions

Docent

A docent refers to an individual who teaches or facilitates face-to-face programs in varied settings broadly defined as museums.

Expert

An expert is defined as an individual who combines knowledge, experience, and problem solving (Herling & Provo, 2000) in the process of engaging in his or her craft.

Expertise

Expertise is “the optimal level at which a person is able and/or expected to perform within a specialized realm of human activity” (Swanson, 1994, p. 94).

CHAPTER 2

REVIEW OF THE LITERATURE

The purpose of this study was to examine the nature of docent expertise. In order to determine the methods and processes used in developing docent expertise, several areas of literature have been reviewed. These areas include historical background and characteristics of U.S. museums; the role of museums as an adult education institution, museum education in general, and the role and preparation of docents in particular; volunteerism in museum; and expertise.

Museums

“The Museum is not meant for the wanderer to see by accident or for the pilgrim to see with awe. It is meant for the mere slave of a routine of self-education to stuff himself with every sort of incongruous intellectual food in one indigestible meal . . .”

- G. K. Chesterton

If you were asked, to describe what a museum is, what would you say? You might picture a stark gallery filled with paintings and sculpture, or maybe you envision grand halls with dinosaurs reconstructed with bones from archeological digs. Museums might remind you of a field trip from your childhood when you were escorted in a line through a building filled with artifacts of ancient civilizations, or maybe you think of a favorite spot from a recent vacation where a collection of aircraft from aviation history was displayed. Where museums were once merely private collections held by aristocrats and universities, today museums constitute much more. Museums in the U.S. offer history within specific contexts like the Country Music Hall of Fame and Museum in Nashville, or Colonial Williamsburg in Virginia. They include vacation destinations like the San Diego and Bronx Zoos, the White House, and the U.S.S. Constitution. Museums also offer the offbeat, such as the Museum of Bad Art (MOBA) in Dedham,

Massachusetts, The Museum of Questionable Medical Devices in Minneapolis, Minnesota, and the Kansas Barbed Wire Museum in Lacrosse, Kansas. No longer is a museum merely a building housing a collection of objects or art, museums in the U.S. in the 21st century run the gamut from traditional to downright bizarre.

As early as the 1770s, museums existed in the United States. Bragg, as cited in Alexander (1993) states that in 1773 the Charleston Museum collected natural history materials, and in the mid 1780's Charles Willson Peale, the first great museum director in the U.S., began a museum in Philadelphia. The Peale collection featured species of animals, insects, and birds, as well as nearly 300 portraits of the Founding Fathers (Sellers, 1969). Although it began in 1838 as a science institute, The Smithsonian Institution transitioned in 1873 to its role as a national museum dedicated to the arts, humanities, and science. Today, its collection numbers over 142 million objects, and according to its website (<http://www.si.edu/>), the Smithsonian is comprised of 14 museums and the National Zoo in Washington, D.C., and 2 museums in New York City. Also in the 1870s, the American Museum of Natural History and the Metropolitan Museum of Art in New York, and Boston's Museum of Fine Arts were being established (Alexander, 1993). The popularity of museums in the U.S. grew during the 1900's with the development of historic house museums, national parks, and preservation sites such as Colonial Williamsburg.

According to Burcaw (1997) in 1876 there were approximately 200 museums in the U.S., 600 in 1919, with that number more than quadrupling in 1940, and then doubling to 5000 in 1965. Today, the American Association of Museums reports that there are more than 16,000 museums in the United States. In his book, *Introduction to*

Museum Work, Burcaw (1997) offers no less than 14 definitions for a museum and finds that even among museum professionals, there is a discrepancy between what is and what is not a museum. For example, The Institute of Museum and Library Services (IMLS) uses the Museum and Library Services Act definition as the basis for eligibility to receive federal funds from IMLS. The definition includes:

1. Be organized as a public or private nonprofit institution that exists on a permanent basis for essentially educational or aesthetic reasons;
2. Care for and own or use tangible objects, whether animate or inanimate, and exhibit these objects on a regular basis through facilities that it owns or operates;
3. Have at least one professional staff member or the full-time equivalent, whether paid or unpaid, whose primary responsibility is the acquisition, care, or exhibition of the public of objects owned or used by the museum; and
4. Be open and provide museum services to the general public for at least 120 days a year.

The International Council of Museums (ICOM) uses the following definition of museum, “A nonprofit making, permanent institution in the service of society and of its development, and open to the public, which acquires, conserves, researches, communicates and exhibits, for purposes of study, education and enjoyment, material evidence of people and their environment” (www.icom.museum). The American Association of Museums (AAM) offers a third definition. Museums must:

1. Be a legally organized not-for-profit institution or part of a not-for-profit institution or government entity;
2. Be essentially educational in nature;

3. Have a formally stated mission;
4. Have one full-time paid professional staff member who has museum knowledge and experience and is delegated authority and allocated financial resources sufficient to operate the museum effectively;
5. Present regularly scheduled programs and exhibits that use and interpret objects for the public according to accepted standards;
6. Have a formal and appropriate program of documentation, care, and use of collections and/or tangible objects; and
7. Have a formal and appropriate program of presentation and maintenance of exhibits.

The encompassing nature of the term museum is due in part to the assortment of institutions which many in museum studies often include, such as historic homes and sites, science and technology centers, aquariums, zoos, botanical gardens, and the traditional art, history, and natural history museums (Falk & Dierking, 1997). Falk and Dierking (1997) state that “many common strands run through the museum experience, regardless of the type of institution, and different types of visitors manifest distinct patterns of behavior” (p. 1). These authors move beyond traditional definitions and characteristics, and offer a more theoretical notion of what constitutes a museum. In their book, *The Museum Experience*, Falk and Dierking (1997) emphasize that a museum is defined within the context of visitor experience, or what they term the Interactive Experience Model. This model, discussed later in this section includes the personal, social, and physical contexts.

These experiences also help visitors to form their own ideas about how a museum can be defined. A study by the Getty Center for Education in the Arts (*Insights: Museums, Visitors, Attitudes, Expectations: A Focus Group Experiment*, 1991) investigated visitor attitudes and perceptions about museum visits at eleven art museums. Visitors in the study described the visits as meaningful and rewarding, and visits that had enhanced their understanding and interest in history and culture. Additionally, many of those surveyed expressed the need for the visit to provide an educational experience. Blackwell (2001) argues that this visitor expectation of education is valid and notes that museums with a growing educational emphasis may become places where ideas are explored, tensions are resolved, and decisions affecting the community are made. He goes on to say that museums may serve as the ‘new town square.’

The boldest interpretation of what constitutes a museum is presented by Carr (2003) who offers the idea that museums, as well as libraries should be recognized for the multiplicity of the institutions. Carr (2003) uses the term cultural institutions to embody these places and notes that there are certain things that exemplify such institutions. First, there is a presence of a collection whether that be art, living creatures, monuments, or books, and according to Carr (2003), “these things ...are offered freely to people who seek them...in the context of a systematic, continuous, organized knowledge structure” (p. xiv). This systematic, continuous, organized knowledge structure is the second characteristic of these institutions. The knowledge structure denoteq a social and intellectual context for the collection and is easy for the user (visitor) to determine. Additionally, it should have, “...a richness to sustain attention, emphasizing in its structure, information, and substance the prevalent influence of scjolarship, information,

and thought” (p. xv). Finally, the scholarship, information, and thought provided in the cultural institution should be accurate and based on empirical data, documentation, deep and significant content, and be offered in various contexts. These characteristics can be achieved through an environment of what Carr (2003) calls, cultural inquiry.

Of the definitions of museums presented here, it is Carr’s (2003) proposal of cultural institutions that most fully evokes a sense of learning. While the birth of museums in the U.S. began with private collections, and viewings for scholars and an elite few, today’s museums serve a range of visitors. Barriers of age, experience, education, economics, and culture are giving way as a new notion of museums is being offered in America. Museums are institutions where the meaning of objects and cultures are expanded, and where the thoughts and ideas of visitors are attended to by providing context, resources, and processes that encourage new perceptions (Carr, 2003).

Educational Role of Museums

Chobot (1989) states that there is an increasing emphasis “...on lifelong learning and the call for a learning society to meet the needs of the information age” (p. 369) and as a result greater demands have been placed on museums to offer learning opportunities for visitors throughout their lives. This increasing social role grounded in education is reflected in some of the definitions of museum education. The AAM in the report *Excellence and Equity* (1991) suggests that museum education be viewed broadly as a form of public service:

The traditional term “museum education” is too specialized to encompass the multifaceted role of museums. This report focuses instead on the expanded notion of public service, defined here as a museum-wide endeavour that involves

trustee, staff, and volunteer values and attitudes; exhibitions; public and school programs; publications; public relations efforts; research; decisions about the physical environment of the museum; and choices about collecting and preserving. These are just some of the elements that shape the educational messages museums convey to the public and the public service they provide. (p. 9)

The concept of museums providing a public service is also emphasized by Perry, Roberts, Morrissey, and Silverman (2000) who contend that it is important to include individuals representative of the public in the planning process at museums. They argue that training of museum staff should be advanced with a focus on the larger notion of the public dimension. And in the larger context, “public and private forums should be held to discuss not only what museums could be but what museums should be” (p. 44).

Similarly, Hooper-Greenhill (1994a) argues that the educational role of museums is central to a museum’s mission. This educational role can be defined as “the development of responsive relationships with visitors and other users such that increased enjoyment, motivation, and knowledge result” (p. 1). These relationships are developed through a variety of educational methods. Museum program types include: lectures, guided tours, field trips, gallery demonstrations, teacher and public workshops, seminars and symposia, film series, classes, theatre, loaning of objects, and the development and dissemination of teaching kits and packs related to exhibitions and collections (Hooper-Greenhill, 1994a; Sachatello-Sawyer et al., 2002). In addition, Sachatello-Sawyer et al. (2002) describe other museum education programs that go beyond what they call bread-

and-butter. These innovative and creative programs include collaborative programs between museums and other organizations, socially interactive programs, programming geared to personal and cultural development, community service and outreach, and programs for special needs visitors.

Even with existing definitions and a basic understanding of the educational programming in museums, the study conducted by Eisner and Dobbs (1986) indicates that there is a lack of consensus about museums' educational aims. There is consensus that museum education is an integral part of a museum staff. While there is an acknowledged importance placed upon the educational role of museums, the work of Eisner and Dobbs illustrates that there is a disconnect within the field.

Although this divide exists, there is a significant amount of literature related to museum education. Hein's (1998) work *Learning in the Museum* provides relevant educational theory as it relates to museums in addition to a survey of research methods used in visitor studies. Hein (1998) suggests four educational approaches in museums: a) didactic, expository education, b) stimulus-response education, c) discovery learning, and d) constructivism. Hein's main goal is to create a resource for museum educators through a review of existing educational theory within a museum context. This compilation is significant for those in museum education who come from other fields such as art history, but offers little in the way of new theory.

The Educational Role of the Museum (Hooper-Greenhill, 1994a) is an example of how museum studies is beginning to combine traditional museum philosophy with educational theory, visitor studies, and evaluation. This text examines communication theory as it relates to museum exhibitions, as well as learning theory in the educational

practices of museums. Part one of the edited text focuses on communication theory and considers how research in mass communication can be placed within a museum context. It brings together issues such as the museum audience, "...and discusses how to increase the communicative competence of museums with a particular emphasis on exhibitions" (p. 6). The second section has a strong concentration on educational issues and addresses the organization of educational services, evaluation methods, learning theory, and teaching within a museum context. This volume of papers is one of the few museum education resources that go beyond conceptual writing, to providing theory and models supported by empirical data.

Another example of museum education literature is *From Knowledge to Narrative* (Roberts, 1997) which uses a form of case study to illustrate the nature and role of education in museums. Through the analysis of an exhibit under development at the Chicago Botanic Gardens, Roberts (1997) was able to address assumptions and debates about education currently circulating in the field of museum studies. The author's study combined ethnography with literary criticism and historical analysis to develop major themes that arose in the planning process for the exhibit. Roberts (1997) identified these themes as: (1) education as entertainment; (2) education as empowerment; (3) education as experience; (4) education as ethics; and (5) education a narrative endeavour. Her findings indicate that education within museums "...is evolving into a rather different animal from what it had been in years past" (p. 132). The new idea of museum education cannot rest on older models of education that view museums as doing the teaching *to* a visitor. Instead, museum education is about finding uses for museums that are personally significant to visitors (Roberts, 1994).

As noted earlier, the research of Falk and Dierking (2000) provides another lens through which museum learning and education can be examined. The Interactive Experience Model includes the personal, social, and physical contexts. Falk and Dierking describe the lessons of the personal context as (1) motivation and emotional cues initiates learning; (2) personal interest facilitates learning; (3) knowledge is constructed from prior knowledge and experience; and (4) learning is expressed in an appropriate context. The second context, sociocultural, points out that learning is both an individual as well as a group endeavour. The physical context is the last part of the Interactive Experience Model, and the authors emphasize the notion that learning is dependent on a person's ability to place prior experiences within the context of their physical setting. These three contexts combine in an attempt to explain, "...how people learn in museums, why people learn in museums, where and with whom people learn in museums, and ultimately what people learn in museums" (p. 219). This model offers museum educators a new way to frame their services, and highlights the role of educational theory in the process of exhibit development, interpretation, and programming.

Also focusing museum education through the lens of the visitor, a series of essays in Carr's (2003) *The Promise of Cultural Institutions* emphasize the *use* of museums, as a place supporting free inquiry. Though conceptual in nature, the essays offer a new paradigm for the role of museums; specifically he speaks to the need for educative museums. These cultural institutions exist "to manage our cognitive challenges by creating good processes and educative structures, to recognize and celebrate good questions when they appear, and to engage with the personal narratives of human beings

as they learn through responding to those questions” (p. 38). Carr’s (2003) approach to museum education does not differentiate between the visitors, whom he calls *users*, but instead stresses that regardless of age, culture, socio-economic status, gender, or race, museums should nurture and engage individuals with “opportunities to be present among inspired objects and to find in the traces of inspiration a transforming sense of human action and construction” (p. 5). This collection offers a great foundation for further inquiry into educative museums. Using Carr (2003) as a model, scholars could study museum using a case study method to determine where and to what extent Carr’s cultural institutions exist in the U.S.

A large body of literature in museum education is dedicated to understanding how children are educated in museums (e.g., Henry, 1992; Krapfel, 1998; Scott-Foss, 1994; Shaffer, 2004; Takahisa, 1998; Wolens et al., 1986). Though these studies are narrow in scope, the findings support the importance of museum education. For example, Fredette (1982) finds that museum programs allow for the growth of a child’s visual thinking skills by enabling them to see ideas in visual art and practice these ideas in a variety of contexts. Additionally, an examination of long-term youth programs in museums found that museums served as a social role model for youth. Museums offer adolescents examples through acceptable rules of behavior, interpersonal interaction, and values systems about how to act in society (Shelnut, 1994).

One notable exception to the primary focus on museum education and adolescents is the research of Sachatello-Sawyer, Fellenz, Burton, Gittings-Carlson, Lewis-Mahony, and Woolbaugh (2002). In a three-year national study of adult museum programs the authors used a qualitative research approach and naturalistic inquiry to interview 508

museum program participants, 75 instructors, and 143 museum program participants in all types and sizes of museums. Sites included art institutes, natural and cultural historical museums, science centers, historic houses, and botanical gardens. The study found that 94 percent of museums offered some form of adult programming, and that museum education is not only important to adult visitors, but adult visitors are actually demanding learning in the museum programs in which they participate.

The field of adult education has also considered the educational role of museums. *Museums, Adults, and the Humanities* (Collins, 1981) includes chapters authored by notable scholars in adult education, including Knox and Knowles and provides numerous case study examples of how museums are integrating adults into their educational programming. The text also provides an overview for practitioners on andragogy and adult learning theory and program planning.

The role of museums in adult education is also reflected in the field's handbooks (Ely, 1936, 1948; Knowles, 1960; Merriam & Cunningham, 1989; Rowden, 1934, 1936; Smith, Aker, & Kidd, 1970). Of note, in the 1936 handbook is a chapter authored by Coleman, who describes the growth of museums at the time and their increasing educational efforts. His comments indicated that support for the role of museums in adult education was vital. Additionally, the link between museums and adult education can be found even earlier in proceedings of the American Association for Adult Education (AAAE) (1928). A member of AAAE in attendance at this meeting, Fredrick Kepel, stated that regarding approaches to art in adult education, he believed that "going to museums and encountering art itself is probably the best" (*Digest of the proceedings of the second annual meeting of the American association for adult education, 1927-28, p.*

136). These early examples testify to the long-standing significance those in adult education place on museums as places of learning, but in recent years the study of museums as an informal source for learning by adults has waned. This lack of interest in these institutions is reflected in the most current handbook (Wilson & Hayes, 2000), where museums are noticeably absent. The under representation of museums in adult education literature is also illustrated in the Adult Education Research Conference. In proceedings since 1993, not one paper has been presented related to the role of adult education in museums.

Hooper-Greenhill (1994a) states that “museums can be phenomenally successful in terms of increasing motivation to learn, in enabling people to discover and develop new passions, in making a previously mundane set of facts suddenly come alive and become meaningful” (p. 1). Within a museum’s education department, docents and their role in facilitating visitor learning is one such way to accomplish this goal.

Docents

The most influential person in the development of docents as educators was Benjamin Gilman at the Boston Museum (Alexander, 1993). In 1907 Gillman organized volunteer museum guides, which he termed docents after the Latin word *docere*, meaning, “to teach.” Gillman believed that these individuals should serve as appreciators and interpreters, focusing not on historical information, but on the art itself. These docents were a novel idea and served as interpreters, as well as addressing the needs, interests, and questions of visitors. In the nineteenth and twentieth centuries the public domain of museums expanded to include the public’s expectation of interpretations of pieces housed in museums (Belland & Searles, 1986). The public demand for guided

tours began with programs led by curators or museum directors and was scholarly in nature, but with the growth in museum popularity, the demand grew beyond capacity, resulting in a need to create corps trained in museum work. In response to this demand, by 1910, the Newark Museum under the direction of John Cotton Dana, established a lecture series, art classes, and an apprenticeship program in museum work (Dobbs, 1990). About the same time, Henry Watson Kent at the Metropolitan Museum of Art developed a system for lecturing in galleries, a slide library available to the public, and school programming (Tomkins, 1970).

In 2002 Sachatello-Sawyer et al. found that nearly 88 percent of museums offered guided tours. Most often docents conduct these tours. Burcaw (1997) provides a simple and current definition of a docent as a trained volunteer teacher-guide, but in the complex world of museums, which can include zoos, historical homes, and even national parks, the docent needs to be defined more specifically in relation to the site. Docents are also called interpreters, museum teachers, gallery educators, and tour guides and while the roles of each have overlapping characteristics, the title is often reflective of the context. For example, within the National Parks Service, interpreters function within a recreational setting with informal audiences, and as a result visitors may choose to leave at any time. In this context, time, setting, and the expectations and needs of the audience become critical to the event (Castle, 2001).

According to McCoy, (1989) today's docents come from a range of groups which includes professional museum staff and museum education volunteers. She states that the typical art museum docent is "an upper middle-class, white female whose average age is 40-50; having education beyond high school, not currently employed full-time, but with

teaching or other job experience, and a history of volunteerism in the community” (p. 140). Docents often work in museums in which they have knowledge of the subject matter, and moreover many have previous docent experience (Kidd & Kidd, 1997). This means that for many individuals being a docent is intertwined with the individual’s museum experiences and serves as a basis for questioning, exploring, and experiencing when visiting museums (Abu-Shumays, 2002). It also illustrates the unique position of docents as they serve as adult educators to visitors, as well as adult learners as it relates to their work as a docent and museum enthusiast. The opportunity for volunteers to serve as docents in museums provides the chance for personal education, growth, and challenge (McCoy, 1989). McCoy goes on to state that such an educated audience as museum volunteer docents strengthen a museum’s role in the community, as well as acting as a source for new volunteers. With an understanding of what a museum docent is, I now turn my attention to focus on the docent’s role in museums.

In its most basic form, Sachatello-Sawyer et al. (2002) state that docents can provide “a brief overview of the entire museum or a more intensive tour of a main gallery, exhibit hall, or special exhibit” (p. 26) and techniques used by docents may come in many forms ranging from lecture to interactive discovery and inquiry. As noted previously, individuals in docent roles have overlapping responsibilities, while still often maintaining unique characteristics based on the museum context. Within National Parks for example, interpreters provide “an educational activity which aims to reveal meanings and relationships through the use of original objects, by firsthand experience, and by illustrative media, rather than simply to communicate factual information” (Tilden, 1967, p. 8).

Along with likely being the only person the visitor sees representing the museum, and offering a range of services through an array of methods, docents face a variety of challenges in their practice. These challenges include managing the needs and interests of a single group of visitors that can consist of a range of ages from school children to seniors, as well as a variety of knowledge levels visitors possess about the topic being covered. All of this occurs while offering friendly discussion about the tour content (Sachatello-Sawyer et al., 2002).

Additionally, docents often have to serve as a form of museum security. The guided tour is often required as well as desired by museums to entrust the care of their collections (Levy, Lloyd, & Schreiber, 2001). Beyond an issue of security the guided tour offers a more personal way to communicate information to visitors. These guided tours may involve a docent or tour guide, or may employ stationed guides who often provide demonstrations or information specific to one area or object (Levy et al., 2001). The array of situations makes the need for docent training critical.

Docent Training

Sachatello-Sawyer et al. (2002) found that 93 percent of the museums surveyed offer volunteer training to docents, and even though these individuals bring to their practice a wealth of information, they often lack the pedagogical foundation to deliver that information to visitors. Worts (1990) states that those in museum teaching roles struggle to frame the components and forces fundamental to their own educational and teaching experiences, and have yet to develop an intellectual and theoretical foundation for supporting their work.

Literature pertaining to the training of docents is underrepresented in the field or is often times too conceptual or site specific. Existing literature examining the selecting, training, and evaluating of docents more often presents personal impressions, not empirical data (Scott-Foss, 1994). The lack of research may be a result of museum educators taking resources from outside the field to train docents. Human resource development and adult education literature, and k-12 pedagogical practices substitute for research in docent training and education.

Even as today's museums recognize and even boast of their educational role in society, the academic preparation of museum professionals is often focused on content. Schouten (1987) found that in large museums museum educators are generally academically trained, and as a result have extensive knowledge of subject matter and objects, but little knowledge of learning strategies. Museum staff are often graduates with degrees in art, art history, and history, which leads to museum educators with extensive knowledge about the content of their institution, but often ill-prepared to train docents in educational theory and techniques.

McCoy (1989) notes, "the effective museum docent must be trained to work with a variety of audiences and understand learning as an interactive process" (p. 138). This is echoed by *The Good Guide* (Grinder & McCoy, 1985). This widely cited trade book, though dated, is still used by museums and is a practical source for how docents should conduct tours. While Grinder and McCoy (1985) emphasize the different learning styles of visitors, possible barriers to participation in museums, techniques of interpretation, and the unique characteristics of audiences, they do not address methods for sharing this information with docents. The focus is on the visitor learning, not the docent.

In my review of the literature I found only one resource that serves museum educators in providing a general resource on how to train museum docents. The guide, published by the National Docent Symposium (*The Docent Handbook, 2001*) is a resource written for practitioners in a variety of institutional settings. The text addresses current concerns and material pertinent to issues in museology. Though not empirically based, the text includes a range of topics including: learning styles, questioning techniques, and addressing challenges in docent practice and is a source for training in observation-based touring.

Burcaw (1997) describes the training docents receive as “instruction in all subject matter ... including not only its exhibits but also its operation and philosophy, and is trained in the techniques of managing groups and of teaching children” (p. 47). Burcaw’s statement is emphasized by John Dewey who wrote in *Experience and Education* (1938), in order to have a successful educative experience, we must balance the didactic with the practical. As Castle (2001) found, docent education is often an example of just that. Formal training of docents is a structured process of classes, observations, and controlled practice and often centers on the institution’s content including: art, objects, animals, places, exhibits, installations, and information. The practical often comes after the initial formal training has concluded. This informal learning can relate to museum content, but more often it is connected to context; this includes how a docent relates to the subject matter, the museum setting and delivery methods, and the audience. This learning happens on the floor in the midst of a program, at the conclusion of a tour or program, when docents discuss their practice with peers and professionals, or when they reflect and process an internal dialogue.

Even with the limited research related to the education of docents, three cases offer insight into the importance of informal learning in this context. Cooper Fleck's (2001) study of paleontology museum volunteers finds that "when asked about the type of training they [museum volunteers] found the most helpful or meaningful, fifty-seven percent of the resulting comments related to informal training methods, such as hands-on, one-on-one, on-the-job training and field trips" (p. 168). Additionally, Scott-Foss' (1994) study of docent-led tours in art museums found that docent education should support opportunities for "interactive dialogue that focuses on problems to be solved, mysteries to be explored, and gaps in knowledge to be filled" (p. 179).

The most significant study into how docents learn their craft is from Castle (2001). She describes her research as an interpretive inquiry examining the nature and experience of teaching in a museum context from the perspective of those educators. The sample included eight teachers, which included docents and interpreters, at three sites: a history museum, an art gallery, and a nature center. In the Canadian study, Castle (2001) found that docents learned primarily through "acquisition of information on the subject; observation, or shadowing of fellow interpreters or docents; and the experience of teaching itself" (p. 321). The study is significant for two reasons. First, it is the only study that looks at exactly how docents learn to do their jobs, and second, her findings indicate that the museum teachers' understanding of their job transpires from a culmination of prior knowledge and situated, on-the-job training, rather than traditional teaching methods. This study provides a solid foundation for further study of museum docents and their preparation, including my study.

An additional source of literature related to docent training is based on research and texts related to docent and museum techniques for educating visitors. This body of literature is sometimes embedded into the content of docent training and is often timely and reflective of the institutional context. For instance, there is work illustrating how different audiences respond to museum interpretation and content and how that research should be used by museum educators. Notably, the work of Beck and Cable (2002), Ellenbogen (2002), Falk and Dierking (2000), Hein (1998), Hein and Alexander (1998), Hooper-Greenhill (1994b; 1994c), Roberts (1994; 1997), Sachatello-Sawyer et al. (2002), and Scott-Foss (1994) offer examples through empirical research and conceptual essays.

Another source of research focuses on training for specific technique or delivery method that can be applied to the docent's practice (e.g. Cherry, 1989; Kowalski, 1994; Wendling, 1991; Wolens, 1986). Moreover, there is extensive research on the experiences of museum visitors, sometimes in relation to the interaction with docents (e.g., Beckman, 1999; Bennett, 1994; Hood, 1989; *Insights: Museums, visitors, attitudes, expectations. A focus group experiment*, 1991; *Insights: Museums, Visitors, Attitudes, Expectations: A Focus Group Experiment*, 1991; Meredith, 2000; Morgan, 1995). A study by Martinello and Cook (1981) also provides an example linking docent preparation and audience – in this case preparing to work with school teachers and classes. The descriptive study was conducted as a preliminary phase of research into museum teaching and learning prior to establishing a program to prepare community volunteers as museum tour guides. Questionnaires were developed for docents and for teachers who visit museums with their students; each questionnaire was intended to elicit

preferences and needs for school tours. Responses revealed the following: (1) Docents are rarely informed in advance of what age group they may be addressing; (2) The group size determines the teaching techniques that will be used on a tour, and, groups are generally too large for anything other than informed lecturing; (3) The amount of museum space that will be covered and the length of time available have an effect on the amount of teaching that can take place; and (4) Communication between school and museum is often not enough to help docents understand what teachers expect of museum visits for their students. More studies such as this one need to be conducted and linked to the development of pedagogical methods for docents, as well as the training literature for museum practitioners.

One more area related to docent education and training is literature focusing on interpretation. Directed toward nature and historic sites, interpretation has a richer body of literature to draw from and use in the training of docents. One such example is the work of Beck and Cable (2002). The text is developed from the early work of Mills (1920) and Tilden (1967), and provides 15 guiding principles for establishing a philosophy of interpretation. The principles state that interpreters have an obligation to spark visitor interest, as well as reveal deeper meanings and truths. The interpretative presentation should be in the form of stories that inform, entertain, inspire and enlighten, while instilling in visitors a sense of beauty in their surroundings. Interpretation must present a complete theme and address the whole person, while injecting passion and a sense of history into the presentation. Program design should be intentional, capable of attracting financial, volunteer, political, and administrative support, and the quantity and quality of the information presented should be well

researched and focused. Lastly, interpreters must be familiar with basic communication skills, and be provided with different interpretative approaches for different audiences. The work of Beck and Cable (2002) is conceptual, but it does provide a foundation for examining the work of interpreters, and even docents.

McCoy (1989) states, “when docents are skilled museum teachers, they use the best personal and instructional techniques to inform, involve, and excite visitors” (p. 149). Today, docent led tours conducted by volunteers has become the staple within museum education and without these volunteers, Newsom and Silver (1978) note that it would be financially impossible to provide thousands of programs to the public. Museums can be run exclusively by volunteers such as the Abigail Adams House in Weymouth, Massachusetts or be a combination of volunteers and paid staff like the Florida Holocaust Museum in St. Petersburg, Florida.

According to the website of the American Association of Museum Volunteers (<http://www.acnatsci.org/hosted/aamv/links.htm>), there are currently over 400,000 museum volunteers in the U.S. Burcaw (1997) contends that “volunteer services are so important at many museums that without them the museums would have to curtail their programs seriously or even close their doors” (p. 46). The impact of volunteer participation in museums or any organization can be seen in both the quality and service of the organization (Brudney, 1990). Brudney’s (1990) examination of government agency volunteers found that a volunteer’s ability to carry out their responsibilities has bearing on organizational effectiveness, as well as an effect on paid employees at the organization. Additionally, the close ties a volunteer brings from the community and

freedom from organizational politics can bring new perspectives and improve overall organizational performance.

Millar (1991) emphasizes the need for placing more prominence on the role of volunteers in museums:

Volunteers are a significant part of the museum community. Volunteers are the ultimate frequent visitors. The growth of museums as the rate of one a fortnight in recent years is due mainly to the huge growth in voluntary trusts and “all volunteer” museums. Yet, in the current debate on the function of museums in society the place of volunteers in museums merits scarcely a mention. It is important to redress the balance. (p. 1)

Millar’s point is well taken considering that, in the review of the literature, I found little directly addressing the subject of volunteer roles in museums. This lack of research is supported by Falk and Dierking (2000) who note that “given that a hundred years of research documents the important role of “teachers” in facilitating learning, it is amazing how little research exists on the role of museum staff – volunteers, guides ... play in facilitating learning from museums” (p. 107) .

Despite this, there are a few studies that consider volunteerism in museums. Found within a larger text on museum volunteers (Goodlad & McIvor, 1998), a case study of five exemplary volunteer programs in the U.S. and Canada, provides examples of the wide range of roles museum volunteers are undertaking. The case study found volunteers in the U.S. museums working as office personnel, information desk attendants, and docents, in museum restaurants and shops, and on traveling exhibits and fund-raising events. Goodlad and McIvor (1998) also cite three reasons why people volunteer in

museums “to satisfy personal aims; because they identify with and wish to support the aims of the museum; because their actions can have a positive effect on other individuals” (p. 85).

When the issue of training and development of volunteers is examined within the specific context of museums, the Goodlad and McIvor (1998) case study is a good source of examples of volunteer management. The study found that there are seven principles for managing museum volunteers. First, museums must define their aims and purposes to volunteers. Next, clear guidelines need to be developed concerning how volunteers are integrated into existing management policies, and the role of paid staff in the process. Third, the role of volunteers needs to be defined and administrators must locate sources of funding for management and training. Fourth, the institution needs to devise a strategy for recruiting and training volunteers, and fifth the training should take place. The training should include an orientation and follow-up training and include supervisors of volunteers whenever possible. Sixth, processes should be in place for motivating and supporting volunteers and lastly, feedback from visitors, staff, and volunteers should be used in the continued development of the volunteer program. These recommendations are similar to those found in program planning models such as Caffarella’s (1994) Interactive Model of Program Planning.

In a British study, Osborne (1999), pulls from volunteer management literature to examine issues specific to managing museum volunteers, and in particular, volunteers of retirement age. Her findings echo those of Goodlad and McIvor (1998), but also point out the need for managers of volunteers to address the physical needs of older volunteers, particularly adequate seating in galleries and access to lounges and restrooms.

Additionally, a text by Kuyper, Hirzy, and Huftalen (1993) provides two models for organizing museum volunteer programs. The first involves an independent supporting organization, and the second uses an integrated volunteer program with a paid or unpaid staff administrator.

In the first model, the policies and procedures of the independent supporting organization are not part of the museum's operations, and volunteers are members of a separate entity (Kuyper et al., 1993). These organizations provide a variety of the volunteer services including fundraising and special events; interpretive programming and administration of interpretive functions; and provide behind-the-scenes assistance with curatorial duties. These supporting organizations often have highly structured rules and regulations governing volunteer responsibilities, conduct, minimum service requirements, and ethics. Additionally, they may provide extensive training while working in partnership with paid staff. The organization's functions are usually under the guidance of a committee with a staff liaison.

The second model involves integrated programs with an administrator (Kuyper et al., 1993). These programs often result when the program becomes too large to manage with leadership from part-time volunteers. The volunteer program is a separate function within a department or may be a separate department with equal status to other museum departments with a paid or unpaid administrator. In an integrated volunteer program the department is part of the museum's administrative structure with professional practices and personnel policies of the museum applicable to both employees and volunteers. In this model, committees of volunteers and paid staff do the planning, and both parties participate in the administration of day-to-day activities.

Additionally, there are practitioners-based texts available that provide an overview of volunteer roles in museums. One notable practitioner text is *Museum Volunteers* (Goodlad & McIvor, 1998). Although the emphasis is on volunteer management, it does include a review of volunteer roles. This British text is significant in that it is the only text discovered in the course of this review that focuses on the museum volunteer. Furthermore, it uses empirical studies to provide a foundation for practice by professionals in museums. Burcaw's (1997) book, *Introduction to Museum Work* states that volunteers fill the gaps found in museum staffs. He goes on to describe two volunteer role types. The first includes individuals who work directly for a paid staff member, and the second type includes those who are required to belong to an official volunteer organization within the museum. Such organizations may function as an arm of the museum or be a part of a larger civic organization that includes volunteering in museums as one of their activities.

A last resource examining museum volunteers in the U.S. is the 1997 publication of the American Association of Museum Volunteers (AAM) (*A Directory of Museum Volunteer Programs*, 1997). This survey, designed to provide a source of reference for museum administrators, contacted 2,250 AAM members and its findings outline museum volunteer programs by state, volunteer activities, and in-museum volunteer organizations. Though not an exhaustive list, the findings represent a snapshot of current volunteer practices in U.S. museums. For example, volunteer programs ranged in size from zero to over 2,500 with the majority of respondents having fewer than 100 volunteers. Volunteers worked in numerous areas and the following is a list in order of greatest percentage of volunteers to least in each role: special events, education/interpretation,

docent, museum shop, fundraising, office/administration, curatorial assistance, collections maintenance, library, admissions/reception, information desk, research/survey, exhibitions, public relations, outreach, membership/travel, registrar, living history, food services, and other miscellaneous roles. According to the findings, the largest numbers of museum volunteer programs are part of museums' educational programming, with over 5,000 docents reportedly serving in 759 museums.

For over three hundred years, the museum has been a part of culture and life in the U.S., and although its role has evolved to include much more than paintings or objects in a gallery, its significance is unchanged. A review of museum literature found that no single definition of museums exist, instead, definitions are based on funding stipulations, visitor experience, or collections and services. Carr's (2003) definition of cultural institutions was the most comprehensive, specifically when examined through the lens of education.

This section also discussed education in museums, noting its uncertain role. In spite of this uncertainty, a significant amount of research exists focusing on the educative role of museums. The last part of this section reviewed literature in relation to museum docents and volunteers in cultural institutions. While volunteer literature is well represented, scholarship specific to museum docents was thin and it was necessary to pull from related studies on museum education and visitor studies to provide a thorough review.

Expertise

“An expert is someone who has succeeded in making decisions and judgments simpler through knowing what to pay attention to and what to ignore.” – Edward de Bono

Over the last thirty years, the study of expertise has expanded greatly. The seminal work of Chase and Simon (1973) and deGroot (1966) of chess expertise has laid the foundation for the study of expertise beyond cognitive psychology into areas of artificial intelligence, human resources and organizational development (HROD) and even athletics. Its growth may be partially due to its connection to building expertise in business and industry, as well as its correlation to the development of technological processes or systems. Expertise literature is broad and includes the defining of expertise and the expert, as well as studies which examine three major areas or generations of study: cognitive psychology, decision-making research, and the third, and newest area, which views expertise as neither uniformly good or bad, but instead finds an individual's performance dependent upon the problem and constraints of the task (Shanteau, 1992). While literature exists that examines expertise in relation to groups, organizations, and society, this section will help to create an understanding of how expertise has been modeled, as well as its pre-conditions and processes.

Definitions of Expertise and Expert

Expertise comes in many forms, from the skills of a typist (Gentner, 1988), to prediction of climate change by scientists (Mieg, 2001), to the work of college housing officers (Jahr, 1995). As a result of this variation, expertise involves a number of meanings. Glaser and Chi (1988a) provide a summary of characteristics of expertise that are largely descriptive, yet generalizable across fields: (1) Experts excel mainly in their

own domains; (2) Experts perceive large meaningful patterns in their domain; (3) Experts are fast; they are faster than novices at performing the skills of their domain, and they quickly solve problems with little error; (4) Experts have superior short-term and long-term memory; (5) Experts see and represent a problem in their domain at a deeper (more principled) level than novices; novices tend to represent a problem at a superficial level; (6) Experts spend a great deal of time analyzing a problem qualitatively; and (7) Experts have strong self-monitoring skills.

When examining definitions of experts and expertise in more specific terms, I found that the concepts are often influenced by the researchers' area of scholarship. Fleck's (1998) critical theory definition details what he describes as the trialectic nature of expertise, including knowledge, power, and tradability. Similarly, Herling and Provo (2000) define an expert as an individual who combines the domains of expertise: knowledge, experience, and problem solving. Within the HROD literature, Swanson's (1994) definition of expertise is "the optimal level at which a person is able and/or expected to perform within a specialized realm of human activity" (p. 94). Likewise, Kuchinke, (1997) in his review of employee expertise, describes an expert as an individual who is "highly skilled and knowledgeable in some specific area, is presumably dedicated to keeping up-to-date through practice and continued learning, and has a sense of commitment to the area or domain of expertise" (p. 73).

Beyond the meaning of experts, models exist to enhance the idea of what defines an expert and expertise. Within the field of social psychology, Mieg's (2001) typology of experts identifies differences between domain-specific knowledge and formal knowledge. Mieg identifies 4 types of domain specific knowledge: local, exclusive, scientific, and

practical, and notes that these categories are not exclusive to one another. Each expert, regardless of the domain, serves as an interpreter of that knowledge to non-experts.

Another model, which developed from shared elements of expertise theories, is Herling's (2000) Basic Components of Expertise. The model is a representation of the relationship between expertise as a dynamic state, expertise as domain specific, and the basic components of expertise, knowledge, experience, and problem solving. This model illustrates that "the most important concept of human expertise is that it is a dynamic state; an internal process of continuous learning is characterized by the constant acquisition of knowledge, reorganization of information, and progressive solving of problems" (p. 13).

This section illustrates the range of meaning placed on expert and expertise. These variations are influenced primarily by the context the expert is in, and the variety of scholarly fields studying expertise. Much like defining expertise, a review of the literature found that there is an array of approaches to studying expertise.

Approaches to Studying Expertise

One method for examining expertise found in the literature is what Mieg (2001) calls a differential approach. This method compares experts with non-experts. Mieg contends that in a differential approach expertise can be viewed in relation to personality or learning conditions. With respect to personality, Mieg (2001) identifies attributes where experts excel in such areas as intelligence, reasoning, and processing. The second difference in experts versus nonexperts is related to learning conditions. Under this area, Mieg (2001) notes that influences like training, schooling, and the ability to cognitively process information impact expertise.

Another way of examining the differential approach is through an analysis of professional work. Scribner (1984) examined workers in a milk processing plant and outlined the concept of working intelligence, and found that “expertise is a function of experience” (p. 24). Experience is central in cognitive psychology as a measure of expertise (e.g. years on the job, hours volunteering). Scribner found that factory workers moved to a different job were still able to outperform coworkers if the tasks were parallel in structure to particular work in the plant that they had repeated on a daily basis. These findings indicate that expertise arises from within a given field and from an inner, cognitive point of view of the individual – expertise-by-experience.

Additionally, Prerau, Adler, and Gunders (1992) state that through experience, as well as training and familiarity with their domain, an expert develops heuristics. These rules of thumb are based on extensive field application and are associational in nature. While the theory of experiential knowledge has a strong footing in cognitive psychology and expert research, this theory does, however, lead one to believe, as Cooke (1992) argues, that if the only criterion for expertise is experience, then it can be defined along a continuum from birth through adulthood. According to Ericsson and Smith (1991), the length of experience is not necessarily indicative of expertise.

In contrast to the notion of expert-by-experience, an expert-by-knowledge, is described by Mieg (2001) as an individual who lacks personal experience, but possesses expert knowledge of the field. An example of expert-by-knowledge includes many in academia. Although individuals such as astronomers and historians may possess expert knowledge in their academic fields, they lack personal experiences since there is little likelihood that they can become a part of the things and events they study. Likewise

Posner (1988) contends that other factors, such as an individual's motivation and capabilities are influential to expert performance. Related to expert-by-knowledge is the idea of deliberate practice (Ericsson, Krampe, & Tesch-Romer, 1993). Ericsson and his colleagues contend that experts are not defined by innate talent or ability, but instead are a result of focused effort and hard work. Deliberate practice theory states that individuals are motivated by the improvement of their performance. It is this motivation factor, not talent or ability that leads to expert performance.

Another theory combining expert knowledge and experience is shallow knowledge (Davis, 1989) and deep knowledge (Chandrasekaran & Mittal, 1982). Shallow knowledge is associational and based on experience. This form of knowledge provides a direct connection between situational observations and data and conclusions, without an individual's explicit use of principles in the domain. Conversely, deep knowledge, which is used in solving problems, makes use of knowledge based on principles fundamental to the domain. Both expert researchers and novices can use such a theory. By combining shallow knowledge and deep knowledge, the theory of expertise knowledge is created (Prerau et al., 1992). Expertise knowledge is formed when an individual does not directly relying on practical knowledge, but instead combines a shallow knowledge level with a combination of deep expert knowledge and related experiential heuristics.

Additionally, PPIK (Ackerman, 1996) is a theory that also combines many traits held by experts. PPIK outlines four components: intelligence-as-Process, Personality, Interests, and intelligence-as-Knowledge. While designed as a representation of intellect

across the adult lifespan, this combines many of the constructs found in other expert literature (Ackerman & Beier, 2003).

Another area of research linked to expertise examines the psychological ability that is used by an expert, such as pattern recognition, memory, problem solving, decision-making, and learning. Cooke (1992) describes pattern recognition processes as “involving the identification of objects, scenes, words, sounds, and speech through the rapid encoding of external environmental input into an internal code that is associated with the stimulus” (p. 34). In other words, an expert, due to experience in a particular domain, is skilled at recognizing specific patterns related to their field. From this came the study of perceptual chunking in chess, which arose from the work of Chase and Simons (1973). This study found that expert chess players were able to breakdown a complex configuration into familiar chunks because of the chess-specific patterns that are stored in their long-term memory. While not universally accepted by expertise researchers, the studies do support the idea that a significant factor of expertise is skilled pattern recognition, particularly in domains that rely heavily on perception (Cooke, 1992). This area of expertise research differentiates experts from novices by identifying an expert’s ability to recognize meaningful patterns within their domain. Cooke (1992) states that such knowledge “ generates expectations, and consequently time is saved because verification of expectancies can take the place of the deliberate reasoning used by novices” (p. 36).

A second area of study involves memory organization. Research in this topic provides what Cooke (1992) calls specific organizing principles. Of particular importance to this research is Anderson’s (1983) ACT model. This model suggests that

knowledge is housed in a graph structure with nodes representing concepts and the relationships linked between the nodes. Anderson (1983) contends that activation occurs through the links and redundant connections within an individual's network, which improves the chances of information retrieval. It can then be argued that since experts have the ability to locate more relationships between concepts than novices, they should have the advantage of more interconnections than in a novice's network.

The organizational factors of memory influence problem solving, which is another area of interest to researchers studying expertise. Anderson (1996) describes the problem solving skills of experts as including: (1) the ability to switch from factual knowledge to performance knowledge; (2) the capacity to use tactical learning, which employs the use of sequences to solve the problem; (3) the ability to create new constructs, which represent key aspects of the problem; and (4) the skill to recognize within problems, chunks, patterns that are repeated in previous problems.

Furthermore, studies examining differences between novices and experts in the field of physics, as well as longitudinal studies involving students provide literature that is relevant to expertise (Chi, Glaser, & Rees, 1981; Schoenfeld & Herrmann, 1982). Regardless of the sample, these studies, as well as others have found that problem-solving strategies are dependent on the problem and an individual's expertise. Another factor influencing problem solving is the effect of experience and knowledge on strategy (Simon & Reed, 1976). Simon and Reed (1976) found that when study participants are influenced by sub goals, strategies would not only differ between individuals, but also within the same individual and the strategies employed become more efficient with experience.

Related to the problem solving literature is research into decision-making processes. Cooke (1992) notes that this research primarily focuses “on the decision-making errors that people make, along with possible explanations for their deviations from optimal responses” (p. 45). One such example is Johnson’s (1988) review of the decision-making processes of physicians placing students in internships and stock analysts predicting security prices. His findings indicate what Kahneman (1991) finds in his summary of decision-making research, that “there is much evidence that experts are not immune to the cognitive illusions that affect other people” (p. 144). In both cases, Johnson (1988) found that the experts excelled in the interpretation of cues when they applied those skills to particular cases, and were weak in their ability to combine mundane information available to them during the decision-making process.

The last area of study related to the psychological ability of experts is learning. Learning theory is one way to explain the transition an individual makes from novice to expert. One such learning theory is learning by analogy. This process results in the acquisition of new knowledge structures from old ones, which is similar to the study of expert memory and the connections made between nodes within a network. Rumelhart and Norman (1981) found that individuals have schemata or procedures that identify things in the environment that are relevant to that concept. Relationships between the known and the unknown cause an existing schema to activate. The new schema is then replicated from an existing schema. The authors note that while learning by analogy is a fast process for a learner, it produces a high occurrence of errors.

Another learning theory is expertise development through learning by doing. Anderson, Pirolli, and Farrell (1988) found that in the case of computer programmers,

individuals did not learn from abstract instruction, such as from textbooks, instead they learned when faced with the challenge of solving a problem. It is this last theory that may combine the prior areas of expertise including pattern recognition, memory, problem solving, decision-making, and learning. Through experimentation an individual can draw from all of his or her psychological faculties to solve a problem by doing.

The notion of learning by doing is also addressed in adult education. For example, situated cognition is a theory that, according to Reynolds, Sinatra, and Jetton (1996), arose from efforts to explain how an individual learns in a “conceptual environment.” Situated cognition is centered on the notion that learning and cognition are fundamentally situated (Brown, 1989). The situation in which the learning takes place, or the context of learning, is an integral part of the learning process. In other words, in situated cognition the learning process can not be disconnected from the situation in which the learning is presented (Merriam & Caffarella, 1999).

There are three concepts important to situated cognition. First, day-to-day learning and thinking are social activities. Second, the availability of situationally provided tools influences the thinking and learning of adults. Third, thinking is greatly structured in relation to a setting (Lave & Wenger, 1991). These concepts are described by Fenwick (2001). Social activities involve an interaction between learner and community, including history, values and rules. Tools are found on-hand and go beyond objects to include language and technology. And the setting is activity at that moment, including challenges and norms. These ideas relate to what Wilson (1993) identifies as a need to connect learning to context. In her

review of context-based learning, Hansman (2001) examines mentoring, coaching, and on-the-job training (OJT) as examples of situated cognition in the field of HROD, and in general, cognitive apprenticeships and communities of practice.

On-the-job training holds the same characteristics as situated cognition but within a specific setting – the workplace. On-the-job training is, according to Jacobs and Jones (1995), a process involving a lead person in a work area passing job related knowledge and skills to another employee. This method can be structured or unstructured, as well as general or specific in relationship to skills acquisition (Barron, Berger, & Black, 1997).

OJT may often be combined with off-the-job or formal classroom training which, according to De Jong and Versloot (1999), is the ideal. Like situated cognition, OJT is contextual, and with respect to docents may be better termed, In-the-job training. They learn in the moment, in the institutions, and in relation to the visitors and exhibits to conduct their practice and hone their delivery techniques.

Situated cognition theories are supported by a study conducted by Daley (1998) that examined the different learning processes used by novices and experts. In twenty semi-structured interviews with novice and expert nurses, Daley (1998) found that novice learning was contingent on concept formation, while expert learning was identified as a constructivist process using active concept integration.

Further expertise research exists under the title of professional expertise literature. These theories provide insight into how an individual knows and how they gain knowledge. One such example is the Dreyfus and Dreyfus (1986) model, which proposes

a five-step model of skill development. Based on studies of fighter pilots and chess players, the authors discovered the importance of intuition in the development of expertise. The stages are: novice, advanced beginner, competent performer, proficient performer, and expert. These points of development are achieved by passing through stages of qualitatively different perceptions of a task or problem. The stages proposed by Dreyfus and Dreyfus (1986) represent three areas of skill performance, including: (1) moving away from reliance on abstract principles to paradigms based on past experiences; (2) development from the use of relevant parts of information to a more complete picture where only certain parts are relevant to the situation; and (3) move from a learner as a detached observer to an involved participant.

Drawing from the Dreyfus and Dreyfus (1986) model, and similar to Scribner (1984), Benner (1984) offers a model of expertise based on the notion that knowledge is embedded in practice. Through a study of expertise in clinical nursing practices, Benner (1984) found that experience was central to expertise and that it develops from a testing and refining of a clinician's propositions, hypotheses, and principle-based expectation when in the context of actual situations.

In addition to Benner's work, the longitudinal study by Fook, Ryan, and Hawkins (2000) of social work students served as a basis for expanding on the work of Dreyfus and Dreyfus (1986). The researchers focused on the dimensions related to the development of professional expertise in social work including: substantive and procedural knowledge, skills, values, contextuality, reflexivity, breadth of vision, flexibility and creativity, use of theory, approach, and perspective on the profession. They concluded that "the expert practitioner is one whom we would expect can take

risks, and act beyond the call of duty. It is these procedural or process-oriented skills and values which may in fact differentiate the 'expert' from merely 'experienced'" (p. 180). As a result they developed another stage of expertise, which they term expert, and by doing so differentiating it from experienced.

A final area of scholarship, which from a practical perspective draws from expertise literature, is research into the characteristics of master teachers. This area of scholarship is significant to this study because docents act as teachers within the context of museums. A master teacher is a term often used to describe a teacher with expertise and skill and knowledge in her or his field. Epstein (1981), in his book, *Masters: Portraits of Great Teachers*, likens teaching to the performing arts, noting that like singing, there are multiple methods for getting the subject across, but no one way of doing it. Master teachers, according to Epstein (1981), draw from a variety of methods from Socratic teaching and passionate argument to personal examples and even bullying. Regardless of the technique, Epstein (1981) found that great teachers share the characteristics of a love of the subject matter, a joy in developing that same love in students, and the ability to convince students of the importance and seriousness of what is being taught.

In Bloom's (1982) study of master teachers working with Olympians and concert pianists, Bloom found that these teachers held a high expectation of student success, rarely offered praise, maintained detailed records of progress, and continually looked for ways to improve student performance. His findings note that a master teacher should have superior knowledge of the subject, be skilled at teaching and produce demonstrable

results, and demand respect from the student while at the same time nurturing the student in the subject.

Furthermore, Allen (1987) found that master teachers possess characteristics including excellent preparation, exceptional teaching strategies, the ability to communicate and motivate, a sound knowledge of the curriculum, interpersonal competence, and proficiency in classroom management. If we adapt these characteristics to master docents, these experts would be superior in their preparation for exhibit content and needs of visitors, demonstrate excellent teaching strategies and interpersonal skills when working with visitors, possess the ability to effectively communicate materials and concepts from exhibits, and have a strong grasp of the subject and museum content.

This section provided a review of approaches taken in the study of expertise and mastery. Expertise literature has been found in a variety of fields including cognitive psychology and HROD and adult education. Cognitive psychology approaches the study of expertise by comparing experts to non-experts, as well as examining the effect of memory on expertise, traits of experts, and the significance of experience. HROD and adult education literature builds on the cognitive psychology literature as well as addressing learning methods and professional expertise literature. Lastly, literature examining master teacher characteristics suggest links to expert characteristics discussed by Herling and Provo (2000) and Mieg (2001).

While the breadth of literature in the area of expertise is wide ranging and encompasses a variety of fields and research participants considered to be experts, my review of expertise literature resulted in a few key characteristics common to experts. Experts know more than others in their domain, solve problems more efficiently, and

differ from novices in their ability to use information in different ways to find solutions. Based on these findings, my study will be informed primarily by the model based on the work of Dreyfus and Dreyfus (1979; 1986), the characteristics of expertise defined by Herling and Provo (2000) and to a lesser extent Allen's (1987) distinguishing characteristics of master teachers.

The model presented by Dreyfus and Dreyfus is important because it provides a foundation for understanding how expertise is developed through a set of stages. Additionally, the definition by Herling and Provo (2000) of an expert as an individual who combines the domains of: knowledge, experience, and problem solving is significant because it draws on areas I believe are critical characteristics of master docents. When these characteristics are combined with Allen's (1987) description of master teachers, a more complete picture for identifying expertise in museum docents develops.

Chapter Summary

The intent of this review was to examine literature related to museums in the U.S., the educational roles of these institutions, museum docents, volunteerism, and expertise in order to build a foundation for addressing the purpose of this study. The review of museums in the U.S. generated several findings. There was considerable literature dealing with the nature of museums, but only a limited amount that speaks directly or exclusively to docents in museums. This void raised concerns as to what information practitioners use in the planning and delivery of training for docents. While empirically based studies were plentiful in the study of visitor groups' needs and interests, the educational function of museums, and the evaluation of programming, much of the docent literature was conceptual in nature. The review also found that museums are

becoming ever dependent on volunteer manpower, and the information generated from this review gives support to the need for more emphasis on the examination and documentation of museum volunteers in terms of development, performance, motivation, and commitment to these organizations.

The literature addressing the development of expertise and mastery served as a foundation for this study. The review of the expertise literature, with its variety of theories and models addressing the development of experts provides a framework for understanding how docents gain expertise in the context of museums. The review of approaches to studying expertise was particularly insightful, and offers a variety of lens for structuring this study. The lack of research into how volunteer docents develop expertise in light of the varied context and roles they service in museums represents a clear gap in the literature.

It also needs to be reiterated that this study has its roots in adult education, and the lack of literature related to museums and volunteers from those in adult education is distressing. While the role of museums as an important provider of informal education had a strong beginning in the field, as indicated in the early AAAE proceedings and handbooks, a review of recent adult education literature reveals that current scholarship no longer reflects the significance of museums in adult education. It is my hope that this study will serve as a catalyst for further study into museums as places of learning and inquiry for adults, as well as children.

CHAPTER 3

METHODOLOGY

This chapter examines qualitative research and its relationship to the study of the nature of docent expertise. Specifically, the study asked: 1) What are the characteristics that define an expert docent? 2) What types of learning experiences lead to the development of expertise? 3) How does the museum context shape docent learning? 4) What is the process for becoming an expert docent?

This section begins with a general overview of qualitative research. I will define purposeful sampling as it relates to qualitative research and discuss the criteria and process used in the selection of my sample. Additionally, I address the three major data collection methods and explain their role in my study. Lastly, I will consider the validity and reliability of the study and my personal biases and assumptions.

Design of the Study

This study was an interpretive qualitative inquiry (Merriam, 1998) seeking to understand the nature of museum docent expertise. Qualitative research methods allowed me to study this idea with depth and in detail (Patton, 2002). This methodology is also appropriate since little is known about the phenomenon (Merriam & Simpson, 1995). This approach allowed participants to relate their unique perspectives on learning in an informal setting, such as museums, and to discover how docents become experts. Numerous definitions of the term qualitative research exist throughout the research literature. Denzin and Lincoln (1994) contend that qualitative research is “multimethod in focus, involving an interpretive, naturalistic approach to its subject matter” (p. 2). The authors conclude that “qualitative research involves the studied use and collection of a

variety of empirical materials — case study, personal experience, introspective, life story, interview, observational, historical, interactional, and visual texts — that describe routine and problematic moments and meaning in individuals' lives (p. 2). Merriam (1998) offers another definition of qualitative research describing it as “an umbrella concept covering several forms of inquiry that help us to understand and explain the meaning of a social phenomena with as little disruption of the natural setting as possible” (p. 5).

Qualitative inquiry is also identified by a set of assumptions intended to address the process and purpose of conducting research (Merriam, 1998). First, Merriam and Simpson (2000) state, “the key philosophical assumption upon which all qualitative research is based, is the view that reality is constructed by individuals in interaction with their social worlds” (p. 97). The fact that there are multiple realities is central to this notion and lies at the heart of qualitative research.

There are additional assumptions at the core of qualitative inquiry. The first of these assumptions is that qualitative research assumes that reality is something that is constructed by each individual learner. This concept is a reoccurring theme within the constructivist and social constructivist literature (Vygotsky, 1978). This philosophy is significant in that it determines how the phenomenon is perceived from the respondent's perspective, not the perspective of the researcher (Merriam, 1998). The second assumption of qualitative research is that the researcher serves as the primary instrument for the collection and analysis of data (Merriam, 1998). This means that it is necessary for the researcher to look at multiple contexts including time and space, as well as the historical, political, economic, cultural, social, and personal (Stake, 1995). The next assumption states that a researcher will be conducting some form of fieldwork

(Merriam, 1998). This includes interviewing participants in their own context and/or observing them as they interact with their natural environment. Another assumption is that qualitative research is inductive involving a process of building abstractions, concepts, hypothesis, and theories through the use of observations and intuitive understandings obtained through fieldwork (Merriam, 1998). Finally, qualitative research assumes that a richly descriptive end product will be produced by the researcher through detailed writings and rich imagery, supported by the use of the participants' own words and data found in documents, videotapes, and in other sources (Merriam, 1998).

Sample Selection

To begin sample selection it is necessary to first determine the criteria important for selection. Once that is completed it is possible to initially identify places, activities, and people (Dewalt and Dewalt, 2002). This preliminary list provides a sample frame for the researcher. In my case this list included history-themed museums and similar cultural institutions where there were docents responsible for leading tours and educational programming. This information was then applied to a more specific sample selection. Purposeful sampling, also called criterion-based selection (LeCompte, 1993) is described by Patton (2002) as centering on the selection of information-rich cases that will explain the questions being studied. In the case of my study, I used sequential sampling; first I used maximum variation samples for the selection of museums and second, intensity sampling for selection of docents within those museums (Patton, 2002).

Museum Sampling

Merriam (1998) notes, “purposeful sampling is based on the assumption that the investigator wants to discover, understand and gain insight and therefore must select a sample from which the most can be learned” (p. 61). It is the selection of such cases rich in information that is in Patton’s (2002) opinion, of central importance to purposeful sampling. It is this notion that brought me to use maximum variation sampling with regard to museum selection.

In the case of my research, variation came from the variety of museums, as well as the array of docent preparation approaches used in the museums. Maximum variation (heterogeneity) sampling allows a researcher to illustrate core themes that cut across variation (Patton, 2002). Although all the sites were museums with a concentration in history, the variation came from the size of the institutions, based on the number of visitors annually, as well as the primary formats the museums used in presenting their content. The training of docents at these sites also varied from primarily self-directed learning to a combination of situated learning and formal programming, to intensive classroom programming. Patton (2002) argues that “any common patterns that emerge from great variation are of particular interest and value in capturing . . . central, shared dimensions of a setting” (p. 235).

To accomplish maximum variation it is important to establish criteria from which to draw a sample. By doing so, you ensure that the sample represents the purpose of the study and leads you to cases rich in information (Merriam, 1998). With respect to museum sampling I made selections based on the following criteria. First, the sites had

to be a museum or similar cultural institution meeting the definition of the American Association of Museums (AAM). This definition states that museums must: (1) be a legally organized not-for-profit institution or part of a not-for-profit institution or government entity; (2) be essentially educational in nature; (3) have a formally stated mission; (4) have one full-time paid professional staff member who has museum knowledge and experience and is delegated authority and allocated financial resources sufficient to operate the museum effectively; (5) present regularly scheduled programs and exhibits that use and interpret objects for the public according to accepted standards; (6) have a formal and appropriate program of documentation, care, and use of collections and/or tangible objects; and (7) have a formal and appropriate program of presentation and maintenance of exhibits. The particular sites selected were museums and institutions with a mission to represent U.S. and/or world history.

Within the general institutional guidelines for defining museums, these history-based cultural institutions utilized volunteer docents through tours or other similar educational programs with adults and/or children. Third, the organization had a structure for training or preparing volunteer docents for service. This training structure included methods for orienting new docents, processes for preparing new docents for their work with visitors, and for providing new and updated information through continuing education or other means for experienced docents.

The selection of institutions with a mission to present U.S. and world history to visitors was a purposeful sample based on personal choice, originating from my lifelong interest in the subject, as well as the realization that some boundaries would have to be placed on the sample for the study to be manageable.

Based on these criteria I selected four sites. The sample was drawn from two states and the District of Columbia. Selection of multiple sites in a single geographical location (eastern United States) was purposeful to accommodate travel and budgetary constraints. The sample included the Abigail Adams Historical Society and Birthplace, the Atlanta History Center, and the U.S. Holocaust Memorial Museum and Boston By Foot. The first three sites would be traditionally termed a museum. The fourth site meets the standards previously noted, but does not have a brick and mortar location housing a collection. Instead, Boston By Foot uses the historical buildings and significant locations in and around Boston as an architectural collection. These sites are interpreted to visitors through volunteer docents.

The Abigail Adams Historical Society and Birthplace is located in Weymouth, Massachusetts. The mission of the organization is to maintain the birthplace of Abigail Adams, and to depict early colonial life. The Society provides tours and educational programming to the public, as well as overseeing restoration projects at the historic home. I selected this historic house because of its small size, with approximately 15 docents and a thousand visitors a year, and for its utilization of self-directed learning by docents.

The Atlanta History Center offers traveling exhibits, five permanent exhibitions (1) Metropolitan Frontiers: Atlanta, 1835-2000, (2) Turning Point: The American Civil War, (3) Shaping Traditions: Folk Arts in a Changing South, (4) Down the Fairway with Bobby Jones, and (5) Philip Trammell Shutze: Atlanta Classicist, and two historic homes, Swan House and Tullie Smith Farm. The Center employs approximately 120 volunteer

docents to facilitate programs in each of the exhibits. The site was selected because of its use of its long-standing docents, the wide-ranging training incorporating traditional training, on-the-job training and mentoring, and the utilization of docents in both traditional tour settings, and as time-period, costumed interpreters.

The U.S. Holocaust Memorial Museum in Washington, D.C. is a national museum with a mission to advance and disseminate knowledge about the Holocaust and to preserve the memory of those who suffered. It also serves to encourage its visitors to reflect upon the moral and spiritual questions raised by the events of the Holocaust as well as their own responsibilities as citizens of a democracy. Docents at this museum are referred to as Educational Programs and Community Partnerships Volunteers. They facilitate a range of programs that include orientations to exhibitions, architecture presentations, family and children programs, and tours of the Permanent Exhibition for school groups, law enforcement professionals, and other members of the community. This site was selected for its large size, comprehensive docent training, and as a representation of a national museum. Additionally, its volunteer docents do not generally work with day-to-day visitors; instead they are often called upon for special programming requiring specialized knowledge.

Finally, Boston By Foot is a 28-year-old non-profit organization with a mission to promote public awareness of Boston's architectural heritage. Boston By Foot offers tours including The Heart of the Freedom Trail, Beacon Hill, Victorian Back Bay, The North End, Literary Landmarks, Boston Underground, and Boston By Little Feet. They also provide a tour of the month, and holiday strolls, as well as specialty tours and slide lectures. This site has approximately 220 docents and was selected for its use of docents

in an untraditional setting and for its well-established and rigorous docent education program.

In each case, during the initial stages of sample selection I made contact with the individual in charge of docents at each site and explained the intent of my study. We discussed the purpose of my study, the role of the institutions in the study, and how they might contribute through the nominating of expert docents. I also gained basic demographic information related to the institution and docent corps, as well as the educational mission of the organization, and roles and responsibilities of the docents. At that time I also determined the interest of the organization in being included in the study.

Docent Sampling

I chose to use intensity sampling in the selection of docents since it characterizes cases that are as Patton (2002) notes, “excellent or rich examples of the phenomenon of interest, but not highly unusual cases” (p. 234). In this study, expert docents are the phenomenon and the sample selection included individuals who are a rich source of information. Thus, I selected cases that show sufficient intensity to explain the nature of docent expertise.

The criteria for nomination included: (1) she or he must be a volunteer; (2) he or she must lead tours and/or educational programs; (3) she or he must have been with the organization at least three years; (4) he or she must be actively involved in the docent/volunteer program by serving as a docent at least six times in the last year; and (5) she or he must be deemed an expert by the key informant. This final criterion for determining who is an expert or master docent was

determined by the key informants based on their own understanding of the knowledge and skills necessary for defining docent expertise.

Selection occurred with the assistance of staff at the selected sites who acted as key informants. This staff included volunteer coordinators and museum educators. These individuals play an important role in identifying expert docents since expertise is dependent upon the context of the institution. As a result, each informant was asked to nominate up to four volunteer docents whom they considered to be experts based on the previous criteria and the context of the institution. I attempted to strive for diversity in ethnic background, age, social class, and years of experience as a docent, but this was difficult because most museum docents tend to be white, upper middle class, and range in age between middle-aged and retirement. Docents also tend to be predominantly female. I was able, however, to achieve some diversity in terms of years of docent experience and the types of tours and programs participants were responsible for conducting.

Once the sample was determined, the nominated docents were contacted by telephone or e-mail. At that point I explained the purpose of my study, the process that lead to their selection, their role in the study and time commitments, and determined their interest in participating in the study. Potential participants were informed of their right to withdraw from the study at any time and confidentiality was assured along with a description of how pseudonyms were to be used to protect their identity. Once individuals agreed to participate, they received a letter or e-mail confirming (Appendix B) their participation, along with details outlining the scheduled interview.

Data Collection Methods

There are three major data collection methods in qualitative research: observation, interview, and the review of documents or artifacts (Merriam, 1998; Patton, 2002). For the purpose of my research I used interviews, and to a lesser extent, observation and documents.

Interviews

The primary source of data collection I used was interviews. Interviewing is defined by Janesick (1998) as “ a meeting of two persons to exchange information and ideas through questions and responses, resulting in communication and joint construction of meaning about a particular topic” (p. 30). Patton (2002) states that the purpose of interviews is to gain insight into another individual’s perspective. And according to Merriam (1998), when it is not possible to observe a behavior, interviewing is necessary. While observation allows me to witness *how* a docent conducts their practice, I was optimistic that the interview would allow me to discover how these docents develop expertise.

During my interviews I used semi-structured, open-ended questions (Patton, 2002). In a semi-structured format the interviewer is generally required to ask specific questions, but uses probing questions as follow-up to elicit greater response from participants (Ackroyd, 1992). With each interview I modified the questions to make them personal and relevant for each docent. Not only were participants’ institutions and experiences different, but the kinds of tours and the audiences they served, as well as their own self awareness of their work and learning as a docent varied greatly.

By incorporating this method I was able to focus the interview to encourage efficiency and allow for the greatest opportunity for varied response from participants. Even with the anticipation of a semi-structured set of questions I understood that an interview goes beyond protocol and design (Kvale, 1996) and anticipated a possible change in plans or direction. Specifically, I considered issues of time, participant apprehension, uncertainty, or lack of understanding about the questions.

The interview format consisted of questions intended to encourage the participants to explore their definition of docent expertise, as well as their learning as docents and development as experts (See Appendix A). Interviews ranged from one to two hours in length, with a large portion of time dedicated to asking participants to describe their educational experiences as a docent and how they developed their expertise.

Ten of the 12 interviews were conducted in person, at a location of the docent's choice. Due to scheduling conflicts, two interviews were conducted by phone, using a phone-recording device. The interviews were tape-recorded and then transcribed verbatim to typed format for analysis. In two cases, follow-up phone calls were necessary to clarify statements and misunderstandings. This not only served to clarify or strengthen emerging themes and ideas in the data, it also gave me insight into how to modify questions for future interviews. Additionally, I received one e-mail from a participant following our interview in which she further expounded on our discussion and provided further details on her comments. Finally, fieldnotes were made following the interview to highlight my own feelings, reflections, and observation

(Bogdan & Biklen, 1998). An example of such notes included short descriptions of my impressions, such as: “small, but certainly not demure” and, “sense of humor, again, her examples are key to this idea,” and “It’s strange to talk to her in her costume. We’re talking about modern things, but she’s wearing this huge skirt and long sleeves and it must be close to 80 degrees!”

Observations

Observation is more than simply watching what is happening. A keen observer will consider the following elements: physical setting, participants, activities and interactions, conversations, subtle factors such as nonverbal and informal actions, and their own behavior (Merriam, 1998). The museums are social and cultural environments, which are critical to a docent’s cognition, identity, and construction of meaning (Lave & Wenger, 1991). It is important to observe the docent practice at each site and the process that docents follow in their work. I observed one participant per site to better understand their role and processes involved in serving as a docent. By taking part in a docent led program I was able to observe a situation that validate data from interviews, including the characteristics of the interaction between a docent and group, and the general skills and knowledge necessary to perform a docent’s job.

In the recording of observations, fieldnotes were utilized. Fieldnotes are important because according to Dewalt and Dewalt (2002), “observations are not data unless they are recorded in some fashion for further analysis” (p.142). An example from my field notes from a tour with Boston By Foot included: “There are seven of us on the tour, most are members or guides themselves. David jumps right in when the

tour begins.” I recorded such observations through jot notes and after the tour I expanded the brief field notes through recordings made into a tape recorder and then transcribing them or by logging the expanded notes into my computer. The following is an expansion from the same Boston By Foot Tour:

After our interview we walked over to the small park where the tour was to originate. It was good to have time to see how the docents interacted on a social level with each other and with visitors. The docents laughed and joked (it was Halloween so some were even dressed up for the Halloween tour that would take place that night) and it was obvious that most had spent a lot of time together both in Boston By Foot related events and in other community organizations or activities.

Such an observation later served to confirm the finding that expert docents learn from others and emotional-social context influences the nature of expertise.

Documents

The last form of data collection I used to a lesser extent was the collection of documents or artifacts that helped to validate participant response or offer a broader understanding of the context and setting. Patton (2002) notes that collection of documents can stimulate new avenues of inquiry that can be pursued only by means of direct observation and interviewing. Additionally, Marshall and Rossman (1999) find that the addition of documents, produced in the course of everyday events, to observation and interview is a useful approach for researchers.

Marshall and Rossman (1999) state that “the review of documents is an unobtrusive method, rich in portraying values and beliefs of participants in a

setting” (p. 116) and may include minutes of meetings, statements, letters, archival records, texts, photographs, and websites. Documents that were useful during this study included: training materials, as well as data available in the public sphere, including brochures, websites, and other marketing materials published by the museums. These materials were used to validate participant descriptions of their formal learning and provided a general understanding of the context at each site. Even with the wealth of information such documents can provide, I kept in mind that a weakness of this method is inferential reasoning (Marshall & Rossman, 1999). In other words a researcher should make sure to display “the logic of interpretation used in inferring meaning from the artifacts” (p. 117).

Data Analysis

Rich amounts of data are produced by qualitative research, all of which needs to be systematically analyzed in a logical fashion (Miles & Huberman, 1984). In this study, analysis took place concurrently with data collection through the use of the constant comparative method (B. G. Glaser & Strauss, 1967). The steps in the constant comparative method happen simultaneously and include: (1) begin collecting data; (2) look for key issues, recurrent events, or activities in the data that become categories of focus; (3) collect data that provides incidents of the categories of focus; (4) write about the categories being explored, describing and accounting for all the incidents in the data while continuing to look for new incidents; (5) work with the data to discover the basic social processes and relationships; and (6) engage in sampling, coding, and writing as the analysis focuses on the key categories (B. G. Glaser, 1978). Social phenomena are recorded and classified, and also compared across categories. The process goes through

constant refinement throughout the collection and analysis of data, continuously feeding back into the process of category coding (B. G. Glaser & Strauss, 1967). These concurrent processes are important, for without ongoing analysis, there is the risk that the researcher will end up with data that are unfocused, repetitious, or overwhelming in size (Merriam, 1998).

In the case of this study, the interviews were transcribed as they were conducted and then analyzed for meanings, understandings or concepts that capture the participants' understanding of the phenomenon. As I read each interview, I identified significant words and phrases in the participant's own words. For example, when discussing expert docent characteristics, the first interviewee repeatedly used words such as "knowledge" and "communication." Comparing subsequent transcripts I looked to see if the same or similar terms occurred, while continuing to look for new terms. Responses such as "knowing your subject," "relating to your visitors," and "humor" emerged early on in the interviews, and I was aware of them as I proceeded. "Intuition" and "personal connections" appeared in later interviews, and therefore I returned to early interviews to see if I had overlooked those concepts, or similar ones, in the preliminary stages of data analysis.

As I conducted new interviews, I added questions and probes based on initial findings generated from earlier interviews. For example, as the idea of possessing a sense of humor began to appear more and more often, I questioned the docents further to determine what it meant for a docent to have a sense of humor. Additionally, I asked docents to share memories of tours that illustrated the idea of maintaining a sense of humor in their work. When the fourth participant used the concept of intuition I critically

reexamined earlier transcripts, looking for phrases that may refer to the concept of intuition. What I found were descriptions of a “sixth sense” and the notion of “just knowing” what needs to be done. Once all the data had been reviewed, findings were aligned with possible properties of each category, and then the categories were reduced into a smaller number of conceptual themes and recorded.

One example of this analysis was when I examined the second research question: What types of learning experiences lead to the development of expert docents? Besides the formal training and continuing education opportunities, participants described activities such as shadowing and observing, exchanging information with other docents, forming mentor/mentee relationships, reading, watching television and movies, and using the Internet. Additionally, the docents interviewed depicted instances of learning as a result of overhearing a peer docent as they gave a tour, or gaining new knowledge or insight as a result of participating in a tour at another cultural institution. These examples were compiled and based on the forms of learning discussed I assigned the category of informal and incidental learning.

Validity and Reliability

It is important to consider the issues of validity and reliability in relation to this study. Merriam and Simpson (2000) delineate between two types of validity, internal and external. Internal validity asks researchers to consider if what is being measured or observed is what is really being measured and observed (Merriam & Simpson, 2000). In other words, the point of internal reliability is to determine how close findings are to the participants’ understanding of the phenomenon being studied. By ensuring internal validity, the findings of the study

can be given credibility. To ensure internal validity, I employed triangulation through the collection of interviews, coupled with documents and observations. Additionally I used member checks. Member checking involved taking emerging or tentative findings back to a number of participants for their assessment. This was accomplished through e-mails to participants. I sent emerging findings to all participants and received replies from four. Reactions were positive and responses indicated surprise, with comments like this one in reply to the importance of context, “Wow I would have never thought of it like that, but you’re right!” Last, I used peer examination, utilizing committee members, additional faculty from the College of Education, and colleagues in a dissertation-writing group to comment on the plausibility of the findings.

External validity focuses on the transferability of the findings to other studies. The reader or user of the information determines the generalizability of the information presented. I do not speculate how findings apply to others, but instead others should determine how information can be applied for themselves. To accomplish this, I used as much thick description as possible, rich with detail, resulting in an audit trail that provides readers with a way to understand how I reached my findings. By doing so, I hope readers will be able to determine for themselves if the information in the study is relevant in their own lives.

Reliability in quantitative work makes certain that study findings can be replicated, but in qualitative inquiry, reality is constantly in a state of change, making it difficult to ensure reliability. Merriam and Simpson (2000) that reliability asks if the “results are consistent with the data collected” (p. 102).

Reliability provides consistency and dependability to a study, and in this study, four strategies were employed: triangulation, peer review, an audit trail, and a statement of my subjectivity. The first two strategies, triangulation and peer review have already been described. An audit trail will give readers of this study a description of how I arrived at the findings. This means that I provided detailed documentation of the data collection process, reporting of my decision making processes, and an explanation of the steps used in the data analysis. Finally, reliability will be strengthened through an explanation of my subjectivities, including my assumptions and biases about the research. This informed readers about how I approached the undertaking of this study.

Bias and Assumptions

Agee (2002) argues that when researchers enter familiar settings where they have been socialized from childhood, they bring with them a set of assumptions. My assumptions are a source of bias (Merriam, 1998), and my experiences in museums, including being an avid museum visitor and museum employee impacts my research design and the collection and analysis of data. As a teacher on special assignment for a museum, I worked for a county school district in the role of curriculum designer, program facilitator, and museum educator. In this role I worked with docents during their training, in their tours, and as a source of information on pedagogy. I also took part in the docent training and served as a docent when the museum needed additional staff for special events. This experience shapes my personal orientation to this study.

In my role as a museum teacher I was witness to how a docent training program is designed and delivered. The process left me wondering if it was the most effective

means for preparing individuals to work with museum visitors. The knowledge and experience of perspective docents was rich. They brought with them personal narratives and firsthand experiences that related directly to the contemporary history presented in the museum, yet it was all but ignored by the director of education. New docents were trained uniformly, without regard for what they already knew. Observing this process made me question if learning took place in these formal activities or did it occur elsewhere. I also noticed that when experienced docents gave tours, they often went above and beyond their training. They incorporated a variety of delivery strategies, new information about exhibits, and found ways to engage visitors regardless of age or experience, none of which was covered in their training.

I am also a museum lover. I have frequented museums and similar cultural institutions throughout my life and have sought them out as a source of information, learning, and entrainment. The docents I have observed as I took part in their tours influenced me. How I assess a tour is often impacted by my education, specifically, adult learning theory. I take note of what I consider excellent tours, and I also remember tours that are terrible, either because the docent was ill prepared to handle the group, or because they lacked information about the exhibits.

Finally, my selection of history museums was influenced by my love of world and U.S. history, as well as the variety of formats in which history museums are able to present information. Ever since I was a child I have found that history museums were a place for me to *become* a part of what I was learning. I couldn't simply tour an historic home, I had to imagine living there, sleeping there, and eating there. I could never just look at an historic battlefield; instead I closed my eyes and heard the canons booming,

saw the smoke roll across the land, and could feel the earth shake from the feet of soldiers marching in line. History museums allow me to explore where I came from, understand why my world functions as it does, and provides a lens for examining my role in my community, nation, and planet.

Chapter Summary

This chapter presented the design, sample selection, data collection and analysis methods of this study, as well as issues of validity and reliability, and my own subjectivity. Qualitative methodology was used with semi-structured interviews as a primary source of data. Documents and observation were also used to triangulate the data so validity of the study may be strengthened. The constant comparative method of data analysis was utilized and reliability and validity were assured through the use of rich descriptive interviews and member checking, as well as the clarifying of my biases and assumptions.

CHAPTER 4

FINDINGS

Describing the nature of docent expertise was the focus of this qualitative study.

Four questions guided the research:

- 1) What are the characteristics that define an expert docent?
- 2) What types of learning experiences lead to the development of expert docents?
- 3) How does the museum context shape docent learning?
- 4) What is the process for becoming an expert docent?

This chapter begins with an overview of the twelve expert docents who comprised the sample starting with those at the Atlanta History Center; second, the findings will be discussed in terms of each research question, with supporting data from the interviews, observations, and review of museum materials.

Participants

As stated in Chapter Three, staff of the docents' museum or cultural institution identified research participants based on their perceived notion of docent expertise. Moreover, participation was contingent upon the experts: (1) being a volunteer; (2) being responsible for leading tours and/or educational programs; (3) having been with the organization at least three years; and (4) being actively involved in the docent/volunteer program by serving as a docent at least six times in the last year. As illustrated in Table 1, the sample consisted of ten females and two males, with four to 22 years of experience serving as a docent at the noted museum or institution. For most of the participants, their work as a docent is limited to one institution, although four also volunteer at other museums or non-profit agencies.

Table 1.

Participant Information

Institution	Name	Age	Gender	Level of Education	Years with Institution
Atlanta History Center					
	April	53	F	Masters	4
	Shelly	47	F	Bachelors	9
	Mary Catherine	55+	F	Bachelors	8
Abigail Adams					
	Cindy	52	F	Masters	15
	Melissa	52	F	H.S.	4
Boston By Foot					
	David	61	M	Some Graduate School	20
	Suzanna	Middle Aged	F	Masters	22
	Madeline	48	F	Masters x2	16
USHMM					
	Bill	63	M	Masters	4
	Ashley	63	F	Masters	4
	Rebecca	60+	F	Masters	14
	Joanna	70s	F	Masters	4

The level of participants' education varied from one with a high school degree to some college to one participant who holds two master's degrees.

April

When I met April she walked into the café at the History Center wearing the simple cotton, long sleeve blouse and full skirt of the mid-eighteen hundreds. If it was not for her more modern, short hairstyle you could have very easily been fooled into thinking she had stepped out of a history book. April is a 53-year-old woman who has been a docent at the Tullie Smith Farm at the Atlanta History Center for four years.

A plantation-plain house built in the 1840s; the Farm is listed on the National Register of Historic Places. Costumed interpreters like April lead tours of the house and perform everyday activities typical of 19th-century rural Georgia. April's initial involvement was participating in a sewing circle at the History Center. Originally she had not intended to serve as a docent, especially since she described her interest in Civil War history as different from other volunteers at the History Center. "My interest in history is not so much like the Civil War battles and things, it's like how did normal people live? How did they do those things before they could run to Publix [grocery store] and buy stuff?" Once April realized that she wanted to move beyond the sewing circle, she found what she describes as her passion: "So, I just started, I said well, I'll give tours and I love it. I quite being in the sewing circle and I do the tours now." April's enthusiasm for her work and commitment to the historical settings such as Tullie Smith are contagious and her ability to communicate her knowledge to others in a straight forward and matter of fact way makes her an asset to the History Center.

Shelly

Shelly also works as a volunteer at the Atlanta History Center, but unlike April, Shelly is a docent at the Swan House, an elegant classically styled mansion. The Swan House contains original furnishings, as well as an extensive collection of decorative arts which include: antique Chinese export porcelain; English and European ceramics; and American, Chinese, and English silver, rugs, paintings, furniture and other objects. Shelly previously lived in Charlottesville, Virginia and was a paid guide at Thomas Jefferson's home, Monticello. After moving to Atlanta, and visiting the History Center, Shelly decided to again get involved in historic interpretation, this time at the Swan House. Shelly, 47, and a mother of two daughters, describes her role at the History Center as ambassador, and states she has a responsibility to provide visitors with a good experience. Building on her experience at Monticello and her nine years of volunteerism at the History Center, Shelly is seen as a mentor to many at the Swan House.

Mary Catherine

Mary Catherine, the third and final docent interviewed at the Atlanta History Center, is a self-described professional docent. "People ask me what I do, and I say I'm a professional volunteer." Mary Catherine's professionalism goes beyond her role at the History Center where she works with school and adult groups in the permanent and temporary exhibits, to include working as a docent for Atlanta's Fox Theatre and Oakland Cemetery. She also works with teachers from Georgia Perimeter College in a course titled, the GHOST Program or Guiding Historic Oakland School Tours. Mary Catherine teaches her students how to conduct tours for school aged children. She has also worked in museums and historic homes as both a volunteer and paid employee in

South Carolina, Virginia, Pennsylvania, and Florida. She has served as a docent at the Atlanta History Center since 1987, when the organization was known as the Atlanta Historical Society. Describing herself as entering a new age range, at 55+, Mary Catherine is a very personable woman, who builds on each of her volunteer experiences to provide visitors to Atlanta with a sense of understanding and engagement.

Cindy

Cindy is a lifelong resident of Weymouth, Massachusetts, and grew up around the corner from Abigail Adams' childhood home. Abigail Adams was the wife of John Adams; Second President of the United States and mother of John Quincy Adams, Sixth President of the United States. The historical legacy that Cindy and others work to preserve is rooted in a lifelong connection to this important woman in American history. For example, as a child, Cindy attended the small, Abigail Adams School, as well as the Adams School, which was the original 1800s schoolhouse. Cindy's mother was a volunteer at Abigail Adams, and 15 years ago Cindy followed her mother's lead in becoming a docent at the historic house.

Cindy is 52 and besides her volunteer work at Abigail, she has been a fourth grade teacher, clerk to the Quincy Historical Society, and has owned a small home decorating business. As a docent, Cindy brings a unique combination of knowledge and fun to her tours, something she believes is very important. "I think you have to have fun. It's very serious. Life is serious. It's serious information, where it is historical and accurate but I think to me, having fun is important." The significance Cindy places on making her tours fun and interesting was apparent when I observed her work. This approach to museum interpretation may have stemmed from her own experiences with history as a child, "I

never liked history because of how deadly boring it can be. It really can be and it doesn't have to be."

Melissa

The other docent participating from Abigail Adams was Melissa, also 52 and a lifelong resident of Weymouth. Like Cindy, Melissa has a strong personal connection to Abigail's home that is rooted in its location to her grandfather's home. The only thing separating her grandfather's house and the Abigail Adams house was the local cemetery. Cindy recalls the influence the house had on her as a child:

The next house, after the cemetery is where my father was born, and all my aunts and uncles and that was my grandparent's home that they built so we use to play in the cemetery. Of course there were hardly any graves back then down in that area you know, so we use to play in the cemetery. So, we saw Abigail's house, that house is part of my childhood, because I saw it everyday if I was at my grandfather's house. Anyway, playing in the cemetery I remember thinking to myself, that some day I would like to be a tour guide, and I thought how queer is that?

Today, Melissa works in retail and is the president of the Abigail Adams Historical Society. She has been serving as a docent for four years. Melissa has the thick accent common to that part of Massachusetts and a straight forward approach that leaves no doubt as to her feelings about Abigail Adams, the Historical Society and the work of docents. She is personable and talkative, two important traits for any docent and her commitment to preserving and sharing the history of Weymouth and the Adams' home is contagious.

Suzanna

Three docents, or guides as they are titled at Boston By Foot, participated in the study. The first, Suzanna, is the most experienced of all those in the study, having been with Boston By Foot since 1983. Suzanna works as a medical editor and describes herself simply as middle aged. Although Suzanna is rather soft spoken and unimposing, when talking about her role in Boston By Foot she fills with enthusiasm and openly shares her experiences. How she came to be a part of the organization is quite interesting. She laughs and smiles as she recounts when she was living on Beacon Hill in a home built in 1832 and supposedly lived in by Henry James. She happened to observe a group outside her living room window one afternoon talking about the author and his time at that residence. Although the group outside her home intrigued her, it wasn't until two weeks later in a bookshop that she picked up a brochure for Boston By Foot and realized they were the ones congregating at her doorstep. Interested and curious about the organization, she contacted the founder and as she puts it, the rest is history and rather serendipitous. Twenty-two years later Suzanna has given just about all the tours available through Boston By Foot to hundreds of local Bostonians and visitors from across the U.S. and the world.

David

At 61, David has been a docent with Boston By Foot for almost 20 years and attributes his interest in the organization to his love of architecture and to his love of Boston. "For me I think it's a personal interest and a professional interest in the city and its development. And, I am keen to hear about and learn about new buildings and initiatives that are taking place in the city." David has given an array of tours as a docent

with Boston By Foot including the Freedom Trail tour and a variety of special tours of the month. I was fortunate to observe one such special tour with a theme of the Boston Fire. David guided the group along the streets of Boston pointing out where the great fire devastated structures, as well as providing a modern history of buildings that now occupy that part of the city. David's experience and education in the field of architecture is apparent and it is intermingled with historical facts and stories of famous Bostonians. Other guides with Boston By Foot have noted that David is their source for information regarding modern architecture and he freely shares his knowledge of new construction projects and renovations with his fellow guides as well as visitors.

Madeline

I was excited to interview Madeline because both Suzanna and David told me that in their opinion she was "the" expert docent at Boston By Foot. Although she is their junior, with only 16 years as a docent, it was clear that she had something that her fellow docents found exceptional. Due to time conflicts we had to conduct our interview by phone, but her candor and vivid examples helped to lessen any potential problems caused by the format of the interview.

Madeline is a 48 year old librarian with Master's degrees in both library science and speech pathology. She has, in her words, given every tour offered by Boston By Foot, including polar tours and a literary tour she designed, and she has also served as a leader for new docents. Moreover, Madeline enjoys expanding on her extensive knowledge of Boston by attending events at the Bostonians Society, the Old South Meetinghouse, Boston Public Library, and the Massachusetts Historical Society. Her passion for her work as a docent is best described in her own words:

I know even on the toughest days, when I was tramping up the hill to give a Beacon Hill tour and thinking, oh, I'm just exhausted or it's crummy weather and I hope nobody comes and I'm standing there and I got a group and all of a sudden you're on and you get this jolt of energy and you just can't wait to start and it's without fail.

Bill

Although Bill and I had a little difficulty locating one another in the vast main floor of the museum, once we found each other our interview was a lively conversation intermingling stories from his work as a docent with his experiences as an educator. Bill is a retired social studies teacher and has served as a volunteer at the USHMM for four years. During that time he has conducted permanent exhibit tours, the art and architecture tour, and a school program called *Organizing History*. Bill brings not only his teaching experience to his role as a docent, but he previously worked as a volunteer for the NAMES Project Foundation, an organization dedicated to preserving and using the AIDS Memorial Quilt to foster healing, heighten awareness, and inspire action in the struggle against HIV and AIDS. These experiences laid the foundation for his volunteer work at the museum and he often connects his expertise as a docent to his time with NAME and as a teacher. Bill's passion and dedication are apparent. When asked about his commitment and enthusiasm for his work, Bill stated, "When I get into it, I just, you know, I embrace it entirely. I want to go the whole way, the whole distance."

Ashley

Ashley, also a USHMM volunteer docent, is actively involved in presenting *Remembering the Children: Daniel's Story*, which is an exhibition for children and

presents the history of the Holocaust in ways that kids can understand. It is the main program for elementary and middle school children at the museum and Ashley has been giving tours in this exhibit as well as the permanent exhibit and the art and architecture tour for four years. Additionally, she has served in the visitor's service department at the USHMM, where she worked to assist, meet and greet visitors and answer questions at the Information and Membership Desks.

When Ashley, 63, retired after 25 years as the owner of a daycare center and became interested in volunteering her time she thought that the museum was, in her words, "a place I could give something to as well as get." Ashley's interest in museums expanded after three years as a volunteer, resulting in a return to graduate school and the completion of a master's degree in museum studies. During that time she participated in two internships, one for the Museum of Natural History in DC and one for the U.S. State Department. Though this took up a significant amount of her time and limited her role as a docent, once completed, Ashley returned to the USHMM with a greater knowledge of museum operations and a renewed sense of commitment to her work as a docent.

Rebecca

Rebecca's work as a volunteer at the USHMM began even before the construction was underway in Washington, DC. Retiring from 23 years as a classroom teacher, Rebecca was approached by a friend seeking help in fundraising for the new museum. Her role at that time was a guide for a site that was yet to exist. She described it this way:

The excitement was that the offices were on L street, the business offices, and they had a mock up of the museum, a scale drawing, not a scale drawing, a scale model in one room that the curators used to make changes to and that's what we

used as a basis for fund raising. We would bring in, invite perspective donors from all over the United States and by basis of this mock up talk to them about the museum.

That was 14 years ago, and today Rebecca has evolved into a docent with not only knowledge of the subject of the Holocaust, but an understanding of the museum itself and its growth and development. Rebecca has been around longer than most of the paid staff she works with, including David, the staff member who recommended her for this study. It was clear from our interview that Rebecca does not hesitate to tell it like it is and offers up her take on her work as a docent in relation to her religion and her deep connection to the museum as a volunteer and member. She is anxious to share stories with her visitors and to give them opportunities to explore the exhibit and whenever possible, meet Holocaust survivors.

Joanna

Finally, I met Joanna, a small woman of no more than five feet with a wonderful talent for making a person feel like a friend the instant you meet her. Joanna has been a docent at the USHMM for four years, but she brings with her a wealth of knowledge gained from her 18 years of work at the Walter Reed Medical Center medical museum. There she was responsible for the docents and head of the volunteer program. Now in her seventies, Joanna works as a docent conducting tours in the permanent exhibit for both general audiences and for the *Law Enforcement and Society: Lessons of the Holocaust* program. Joanna loves her work as a docent and describes her feelings in this way, "I'm a very enthusiastic kind of person. I like something you know it. I don't like something and you know it, but it shows you in the tours, because when I like something

I'm very enthusiastic." That enthusiasm was apparent in our interview. She eagerly shared her experiences at Walter Reed, as well as recalling stories from tours she had given at the USHMM.

Findings

Findings are presented based on each of the four research questions guiding the study. As can be seen in Table 2, the characteristics of expert docents can be categorized as facilitates learning, integrates prior experience, demonstrates enthusiasm and commitment, and maintains a sense of humor. The second set of findings encompasses the types of learning experiences that lead to the development of expertise in docents. These learning experiences include formal training and continuing education and informal and incidental learning. The third category of findings examines the role of context in shaping docent learning through both physical, emotional, and social influences. The last set of findings relates to how an individual becomes an expert docent, which can be illustrated through a process of Dependence, Growing Independence, and Transcendence.

Expert Docent Characteristics

The characteristics of docents considered to be experts include facilitating learning, which is comprise of communicating information, reading the audience, knowing the subject matter, and adaptability. In addition to facilitating learning, expert docents possess the ability to integrate prior experience, and demonstrate enthusiasm and commitment all the while maintaining a sense of humor about themselves and their work.

Table 2.

Overview of Findings

1. What are the characteristics that define an expert docent?

Facilitates Learning
 Communicating Information
 Reading and Adapting to the Audience
 Knowing the Subject Matter

Integrates Prior Experience

Demonstrates Enthusiasm and Commitment

Maintains a Sense of Humor

2. What types of learning experiences lead to the development of expert docents?

Formal Training and Continuing Education

Informal and Incidental Learning
 Learning From Others
 Self-Directed Learning
 Learning by Doing

3. How does the museum context shape docent learning?

Physical Context

Emotional-social context

4. What is the process for becoming an expert docent?

Dependence

Growing Independence

Transcendence

Facilitates Learning

A recurring characteristic of expert docents is an ability to facilitate learning and engage visitors during a tour. While the participants found it difficult to formally determine the level and extent of learning in their tours, they each described skills for facilitating learning, including the ability to communicate information, reading and adapting to an audience, and knowing the subject matter.

Communicating Information

All the participants described the need for docents to possess basic communication skills. Shelly describes it this way, “I think you need to be able to speak, be very fluid with public speaking and be comfortable in front of a group.” Similarly, Joanna states that, “I think communication skills go right on top. I think if you don’t have that you really can’t give a good tour.” The importance of strong communication skills was summed up by Mary Catherine who explains, “Make whatever you’re telling them something that they can walk away with” and to accomplish that she goes on to say, “You’ve got to have that spark to communicate, rather than, don’t just spew out the facts.”

Even with strong communication skills facilitating learning in an informal setting such as museums, with groups that are often visiting the site voluntarily, is a challenge. To address this issue, docents like Bill have specific methods for engaging their audience. He explains,

Sometimes you get reluctant people, you know, among adults too, they aren’t quite that interested in hearing you know, what you are putting out to them. And I like to use a Socratic method. I don’t like to lecture. I don’t like to stand and point things out. I like to ask questions, and have them answer the question by

looking at the exhibit and finding evidence or finding examples within the exhibits themselves, but are good answers to the questions.

Bill went on to describe tricks of the trade that help to engage the audience, “It's little tricks like modulating your voice. It's little tricks like making sure you're not constantly focusing on one person. It's picking out somebody in the back of a group and asking a question of them.” While Bill draws from his experience as a teacher to facilitate learning, others have gained skills over time through their work as a docent. Joanna recognizes this: “I don't think you have to be a teacher, but you have certain skills, to speak fluently, coherently, and not to speak over their heads, because sometimes there are a lot of big words and you can scare people.”

Another challenge for docents was facilitating visitor learning for a wide range of individuals, including ages, education, and experience. Madeline describes the challenge of facilitating learning:

When I first started giving tours I just assumed that there were basic things that everybody knew and I've come to learn that that's anything but the case and so you can try to figure out how basic you want to be, but you know you can't agonize over every little thing. You have to give some of the responsibility to your tourees to ask questions. If they don't ask then you can't be a mind reader, but that was very hard for me in the beginning because it just never occurred to me that people didn't know who Sam Adams was or John Adams or John Hancock.

Mary Catherine has had a similar experience in her work at the Atlanta History Center. She notes, “I've done Civil War tours, adult Civil War tours, and just assumed

that people knew things and in some cases you just have to start from the beginning.”

Mary Catherine is also aware of the needs of student groups visiting the Center and consults the State education benchmarks for K-12 to be able to connect her tour to the work students are doing in their classrooms.

In Melissa’s case, the size of the Abigail Adam’s home allows her to stray from a standard format, which enables her to meet the needs and interests of her visitors. She often asks informal groups, not affiliated with a school or group what they are interested in learning about: “I say, this is your tour and I’m volunteering and we can do what we want.” She finds that in this way she can create a presentation that is tailored to the group and at the same time keeps her excited about how a tour might end up.

Additionally, the docents interviewed often admitted that although they did not formally assess visitor learning, they had set for themselves certain standards that they tried to meet in order to give visitors a memorable experience. Suzanna describes her technique for her walking tours of Boston: “Narrow it down to three [features] and show the same three features in several buildings along the way so that people get an idea what to look for and I have found out that it works pretty well. People seem to, they seem to like that.” Ginny spoke of her work engaging young students who visit the Abigail Adams House:

You have to explain a lot more to kids to make sure they are understanding. I think with kids it is a huge responsibility for docents because you can really peak some kid’s interest in history or kill it. You can make it something so dull or boring or something that they don’t understand that it’s not worth it or say like, sleep tight, you know things like that. Or how would it look different? How

would it be today? It's just different. Its not that it's not intellectual, you have to explain better on terms they can understand.

April as well has a plan for delivering information to visitors. "I just go geographically around the room and if you can take this information which is pretty disparate, I mean you've got a fireplace over here and a table over there and kind of make a story out of it." Other participants mentioned the use of story as well. Joanna describes the beginning of her tour, "When we get off [the elevator] I say, we are now in 1945, the war is over, you're a soldier, you're coming in and this is the camp that you just liberated, just remember that you're in 1944." She continues the story with her audience, "We will go back to 1933 and see where it all began."

Reading and Adapting to the Audience

Another aspect of facilitating learning is a docent's ability to read an audience at the onset and during a tour, and adapt to the needs of visitors. All of the participants expressed the importance of reading individuals and a group as a whole to the success of a tour. For some, reading an audience is picking up on the physical signals given off, like a fidgeting visitor or a group distracted by issues such as time constraints. For others, reading an audience includes taking the opportunity to find out a visitor's motivations or interests in attending a tour. Regardless of the catalyst an expert docent can see the signs and adapt to the situation.

Several of the participants found that reading an audience was rooted in the ability to look into a visitor's eyes and see what the visitor was feeling, thought, or needed. Mary Catherine describes the process, "Visually, you can read faces, read eyes. The eyes are not going to lie to you." For Cindy, looking into the eyes of a visitor is also a way of

determining if a connection to the content is being made, “Most of the time you can see it in their eyes. You know and its ah, its like the light goes on. Someone makes a connection.” Others looked at the visitor as a whole, picking up on the physical cues that might indicate that a tour is going well or going awry. April finds that you not only have to read your audience, but you have to also consider what they may want to know. She notes that you have to read their cues:

If they’re, if they're interested or they're not, or they seem to be more interested when you talk about housekeeping and sometimes you go that way a little more or, if it's all women, sometimes you talk about their clothes a little more. The men will ask you things about the nail heads and you know, you don't want to stereotype them and assume, but if you can just have some kind of interaction even if it's subtle, it kind of helps to know where you're going.

It was also important to be able to anticipate when a visitor is saturated and cannot take in any more information. Participants describe knowing at what points in a tour they need to be particularly aware of how their audience is reacting to a tour. Ashley recognizes the importance of the content shared in her tours at the U.S. Holocaust Museum, and as a result is sensitive to her audience: “When you’re doing a tour, you don’t want them to get too tired, cause you can see their faces go. It’s so much to learn, so keeping it moving.” The same was true for Rebecca, who emphasized knowing your audience and reading their physical signs in order to know how much information to give. She states, “Don’t overwhelm them with all that you know. That’s not what they’re there for, ok, because everyone knows more then they should be giving.”

Beyond reading the signs a group of visitors may transmit during a tour, participants also describe the need to read their audience at the start of a tour. David describes this process by stating, “I make a point of asking up front, where people are from, get an idea if they are hearing stuff for the first time or whether it’s old hat to them, that allows you to sort of figure out what you can sort of brush over and need to focus on.” For Suzanna, it is also important to find out upfront a little bit about her audience. She accomplishes this by asking the group questions:

Are they interested in history? Are they interested in architecture? Where are they from? Have they been here before? You know we get special interest groups and that’s a little easier because somebody is interested in one particular period or something. But um, I try to figure out, even at the beginning of the tour just talking to people, sort of, what kind of an emphasis they’re looking for.

Similarly, Melissa speaks with her audience to determine how much they already know about Abigail Adams: “Most times I will start the tour, I will ask them what they want to know. I let them set the tone.” She goes on to acknowledge that getting an understanding of what visitors want from a tour is critical: “Some people, they already know all about the revolution or they already know about Abigail Adams. They just want to know about the house,” she continues, “ Other people want to know about, what did they do all day? Activities and that sort of information and then I try to alter it as I go along.”

For the participants, adapting to the audience, or flexibility was also integral to a docent’s ability to facilitate visitor learning. The notion of adaptability revolved around the idea that to be a successful docent you must be able to read the audience and then

adapt to situations, audiences, and changes that impact a tour. “You have to adapt to the situation,” Joanna stresses in her interview, “being flexible, being able to adapt and take the same subject in a whole different way.” It is the flexibility in docents that more often separates them from the novice docent. The participants in this study recognized that a docent who gave a “canned tour” meant that they could not meet the needs of a group interested in a particular event, building, or time period outside their standard script.

The participants believed anyone could give a scripted tour, but it took an understanding of the work of an experienced docent to be able to use their repertoire of knowledge to bend to the new situation and to the needs of the visitors. Bill emphasizes this idea: “I use to hate tours that were canned, where a person would start and it was like turning on a tape recording and they would just go through until the end and then the machine would shut off.” Instead, Bill is conscious of his visitors’ needs and interests and as a result is flexible in his delivery and approach to an exhibit or tour.

For Mary Catherine, flexibility is critical and she mentions it no less than five separate times in her interview. She relates a story of a tour she had witnessed that exemplifies how the ability to be flexible and adapt to an audience can impact a tour. She began by describing characteristics needed to be an expert docent:

Flexibility, the ability to think on your feet, to make changes when necessary. One of my favorite stories was a tour I took once of the governor's mansion in Columbia and someone asked the poor girl who was taking us through the governor's mansion, asked her a question. She had to go back to the beginning of the room and start over. She just, it just went out the window. So, sometimes you'll walk in and there's another group where you're suppose to be. You've got

to kind of tippy toe around and the group ahead of you is taking much longer than you were anticipating. You have to sometimes go backwards.

Shelly points out that the need for flexibility is crucial because you can never be certain who will be in a tour group: “I think it is an important characteristic to point out that’s important in guides because you never know who you’re going to have, how interested the group will be.” She explains that a docent may be faced with a disruptive child or an elderly person who needs to sit during a tour. She went on to say, “You have to be willing to just sort of work with your group to make it the best experience you can for them, and that requires being flexible.”

Even when you know your group, you have to be prepared to adapt and modify a standard tour. David’s expertise in architecture and his experience as a docent make him a natural choice when a group of engineers visit Boston. “I do a lot of tours, a lot of the tours that I do are specials. They’ll call me in for a group of engineers for instance if it’s [the tour] interested in a particular method of construction or something like that.” For those tours David does not simply lean on the regular tour outlined by Boston By Foot; instead he possesses the flexibility and willingness to adapt to create a new version of his traditional script. It is this characteristic that David admires in other docents, “The good ones in my opinion are the ones who can sort of wing it a little bit and not have to be scripted.”

Knowing the Subject Matter

Another characteristic of expert docents and their ability to facilitate learning is knowledge of her or his subject matter. This idea is described by all the docents as fundamental and without it a docent simply cannot be successful. When describing this

characteristic sometimes a participant would begin with a phrase such as “first of all” but more often participants included this characteristic almost as an afterthought, as though it was an underlying assumption that docents must have the facts as they relate to the tours they give and the institutions they serve. For example, David states, “Obviously, the general knowledge, that goes without saying.” Likewise, Suzanna said jokingly, “Okay, It’s a person that has first of all, the bottom line is, you have to have the knowledge. That really helps a lot, (laughter) if you start out with the knowledge.”

April simply explains that “the more knowledgeable you are, the better you are” and Rebecca as well finds that a docent has to “have the background, the history, the knowledge, so that they are giving factual information.” For all the participants, accuracy was important, and while some acknowledged that they don’t always have a date on the tip of their tongue, in Melissa’s case the basic knowledge of the Abigail Adams House and its history was critical. “I tried to memorize especially dates, especially things that you knew people were going to ask. You know, definitely, when the people were born, when they were married, when the house was moved, when it was built.” For others, like the guides of Boston By Foot, knowledge must be updated almost with each tour since the “museum” is the city, and the city is constantly evolving.

Madeline said that it was explained to her this way:

I remember my group leader always said that one of the first things you do when you start a tour is get there twenty minutes early, make sure no new buildings have gone up. I always thought that that was good advice because things do change sometimes in the blink of an eye.

It is not simply a matter of having a knowledge base, but a repertoire from which to draw, this is emphasized by April who notes that, “You have to know your subject well, so well that you can do it in different ways.”

Several of the participants also discussed the need to balance the amount of knowledge they have at their disposal with how much is appropriate to share with visitors. Shelly explains: “There's so much information; it's trying to pick the right information for the time.” She goes on by noting that the key to this equation is taking cues from the group: “There are certain things that they want them to leave the house knowing, but I take cues from how people are responding to different types of information.”

Integrates Prior Experience

The next characteristic of expert docents is their ability to integrate their prior experiences, both professional and personal into their work. Cindy states quite simply, “you bring your background into it.” In other words, these expert docents cannot separate their experiences outside the museum, with what occurs during their tours. In some cases, the participants described the influence of careers, such as teaching, while others found that previous volunteer work, especially in museums, was significant. Participants also related personal experiences and situations to their work at the museums, and described how such situations filter down to the visitors on their tours.

A significant influence on expert docents is the impact of work experiences on their role as docent. Bill attributes much of his ability as a docent to his time as a classroom teacher. “I have skills that I acquired in thirty years of teaching, some expertise in the field of education, and some interest in history of course because I was a

history teacher.” Ashley too describes her teaching experience as prominent, and finds that she uses that background when presenting a tour designed specifically for children: “There’s a skill in working with children and parents and that, that’s something that’s easy for me because that’s what I did in my prior life, so I don’t have a problem with that.”

Because David works in the field of architecture, he reads local trade publications related to development, restoration, and construction in the Boston area. He finds that such information is useful on his walking tours of the city and notes that if there is a site along the tour that is about to undergo restoration or if a new building is about to be constructed he will, “try to weave that into the tour.”

Joanna finds that her prior volunteer work has prepared her to serve as a docent at the USHMM. She states, “I’ve been a professional volunteer and very active in my organizations and I have done just about everything in there.” Mary Catherine and Shelly bring a combination of both volunteer and paid work experiences to their roles at the Atlanta History Center and each places a lot of significance on how those positions have shaped their ability to successfully present materials and interact with visitors during a tour. Mary Catherine describes one particular activity at the Museum of the Confederacy working with diaries of Civil War soldiers. That experience has increased her knowledge and added to her repertoire of stories that she shares with visitors:

I started transcribing diaries which did nothing but add more knowledge and you could actually follow these soldiers from boot camp all the way to the end of the war and their experiences, and they named battles and ... that knowledge has helped me draw on things that I have been able to use in other volunteer jobs.

Shelly said that taking part in Dale Carnegie courses and being a member of the Junior League have given her tools that she transfers to her role as docent and in particular has made her confident in her public speaking ability. Beyond that, she spoke in detail about how her work as a paid docent at Monticello has made her a better docent in Atlanta. At one point she shared how the hot weather and long lines in the summer at Monticello taught her how to handle visitors. She states:

Sometimes people would be by the time they got to the front door they'd be sick of being in line for two and a half hours, so you'd have people who are excited to be there but they're not excited. You had people that weren't maybe in the most positive frame of mind so I think just present the material in the most interesting light that you can. Respond to people's questions, I mean just the importance of being sort of on your game each time you do it. That's what I got from Monticello.

Still other participants spoke of personal experiences that they use in their work as docent. Suzanna's home is along the Beacon Hill Tour route and admits eavesdropping on the guides that stop in front of her door. She ties her life on Beacon Hill into her own tour, and finds that her visitors gain from her personal understanding of the historic neighborhood. Melissa too draws from personal experience. She recalls how her experiences as a child influence how she engages school children during a tour: "I don't like to ask so many questions that the same children are answering.... It makes the other kids that don't know the answer, it makes them feel uncomfortable because they feel stupid." She goes on: "I am very sensitive to that. I remember being in school and there

was always those kids who would raise their hands for every question and they had every answer.... You just sat there and felt like an idiot.”

Demonstrates Enthusiasm and Commitment

Each of the 12 participants stated that an expert docent must be enthusiastic and such enthusiasm needed to be reflected in a docent's tours. Enthusiasm and commitment are important for participants for two reasons. First, these characteristics help to keep both the docent and the visitors interested in the tour and the content presented and second, enthusiasm and commitment were a source for fighting against situations that are frustrating to the docent such as disinterested visitors. These characteristics can also be described as passion. These expert docents exhibit a passion for what they do, how they prepare for that work, and how they share their work with others. Melissa describes this notion of passion in how she prepares for a new tour season. Each spring she gets her self revved up: “Come spring, every spring I read, or reread a book on Abigail and read my book over and over again just to get in the spirit again, so come spring I would always start reading my history books.” Her passion for the Abigail Adams Historical Society is apparent in all aspects of her involvement, from her preparation each spring, to her role as President of the Society, to how she talks about the house. A docent's ability to display this passion through their enthusiasm is summed up by April: “I think if you're enthusiastic about something it translates to the person who's with you.”

The docents in the study did not specifically mention commitment; instead they demonstrated their commitment to the organizations and subject matter through their words and actions. It is not simply a willingness to give a tour when you're scheduled to,

but it is a sense of responsibility to the institution and its mission. Rebecca puts this idea into words: “They [docents] have to care about the project, the purpose, the whole thing.”

It is important to remember that these participants are all volunteers, so there is presumably a sense of commitment in their work, but for some there was an obvious dedication to the work that they performed, and a willingness to go beyond what might be expected. For example, Bill describes what is involved in getting to the USHMM, “I live thirty miles outside of the city and depend on public transport to get here. That's a complicated process, plus my physical problems that I've been having, so there has to be that sense of commitment to do it.” Bill could have volunteered anywhere, somewhere more convenient, but instead his commitment to the work and mission of the USHMM, and his passion for teaching and history win out.

In her seventies, retired, and certainly entitled to relax and enjoy her golden years, Joanna was enthusiastic and committed to her learning, even the extensive amount of reading and preparation required by the USHMM. She described all the required reading material and research as fascinating and states, “I loved it. I spend, I never thought I would, but really, I said, I'm getting another degree, that's all. That's the way I felt. I really felt I was getting another degree.”

These volunteers also are committed enough to see beyond a bad tour or a bad day. In Mary Catherine's case, when something upsetting happens on a tour, she doesn't have to stick around or return the following day, but she does. She said it is critical for a good docent to love what they do, because it doesn't always go well: “I'm just going to hang in because I come home and I kick doors and I scream, but it's really rewarding just to see somebody make that connection. ” Similarly, Cindy jokingly describes the

magnetic effect working as a docent at Abigail Adams has had on her: “I mean you do get into it. I couldn’t get out, but in a good way.” Ashley illustrates how enthusiasm and commitment are linked by stating that it is important to “be in the right frame of mind and the right place and get that enthusiasm, because if you’re not then that can contribute to maybe to not having a good tour.”

Maintains a Sense of Humor

One of the most surprising findings in this study was the recurring idea that an expert docent has to have a sense of humor. Suzanna was the first to introduce the importance of a sense of humor, but it was reiterated over and over again by all but two participants. This characteristic means that a docent is entertaining, infusing humor into a tour where appropriate, so to speak, but more often a sense of humor in an expert docent means being able to roll with the punches, no matter what a visitor throws at you or what situation may arise. This was expressed in an e-mail sent to me by Mary Catherine after our interview. She wrote, “I did start analyzing our conversation on my way home and had one or two additional thoughts. While it is a good thing to take the job seriously, a healthy sense of humor and sense of the absurd helps me from taking *myself* too seriously.”

Cindy who serves at the Abigail Adams House emphasized the role of humor in a docent’s work like this, “I think more than anything and it sounds very frivolous, I think you have to have fun.” She goes on to stress that while history is serious and a docent needs to be historically accurate, he or she shouldn’t take life too seriously. Like Cindy, Shelly, at the Atlanta History Center defines her approach to presenting as, “sort of

friendly and low key and if you can have humor with people I think it kind of breaks the ice.”

Madeline exemplifies the previously discussed characteristic of commitment and sense of humor when giving tours through the streets of Boston. Regardless of the circumstances, whether in the middle of winter or during the driving rain of a hurricane, she always shows up and maintains her sense of humor. She shares one story from a Beacon Hill Tour:

When we had Hurricane Floyd I was guide and I had people show up. They were from Oregon so they didn't think this was anything and the one woman said, “Boy, you should see your face” and I said, “What do you mean?” and she said “You weren't expecting anybody.” And I said, “I always expect people” and so then we got some passerby to take our pictures because they wanted to show their husbands that they were crazy enough to be taking this tour. So, we had a lot of fun actually. We were absolutely drenched and I figure people who come in the inclement weather really want to do it, so there really is a sense of you against the elements.

Madeline's work with Boston By Foot does well to illustrate how a docent must keep a sense of humor about themselves and their work and be prepared for what Mary Catherine previously described as a sense of the absurd. David also reiterated the importance of finding humor in the unexpected: “You just have to roll with the punches, and be able to make light of things that come up.”

Like Madeline and David, Suzanna is a docent with Boston By Foot. She described how giving tours on the streets of Boston challenges her to maintain a sense of

humor about unexpected situations. “Sense of humor is very important. I can remember, this was right at the beginning. Beacon Hill, it was trash day. They have trash out on the street. A rat came between me and the people that I was talking to.” Laughing, she explained how she handled the situation with humor:

I could see the rat behind them. I thought, ok, that’s going to be the only thing they’ll remember if they see that, so I just tried to maneuver them around it. I’d say, “would you like to move a little in this direction?”

Ashley maintains a sense of humor about her work when describing what sometimes happens during an art and architecture tour at the USHMM, “Sometimes you can approach people and you say, oh, you want to know, this and this and this? They’re like, they turn and walk away from me.” Rebecca too recognized the need for maintaining a sense of humor when she conducts tours at the USHMM for high school students, “I think you have to keep a sense of humor first of all because young people are, young people.” She goes on to say, “They don’t think it’s offensive to chew gum, or push each other or sometimes you get romantic liaisons right on the trip at ten o’clock in the morning.”

This section addressed the characteristics that differentiate an expert docent from a novice. The first characteristic is termed facilitating learning, and includes communicating information, reading and adapting to the audience, and knowing the subject matter. In addition to these characteristics, expert docents possessed the ability to integrate prior experience and demonstrate enthusiasm and commitment all the while maintaining a sense of humor about themselves and their work.

Learning Experiences

The next section in this chapter focuses on the second research question: What kinds of learning experiences lead to the development of docent expertise? Expert docents described two forms of learning that lead to the development of their expertise and these two categories I have labeled Formal Training and Continuing Education and Informal and Incidental Learning. When I asked participants to describe how they developed their expertise and knowledge as it relates to their role as docent, they offered a variety of learning experiences from formal programs sponsored by the institution, to learning from others, self-directed learning, and learning by doing.

Formal Training and Continuing Education

The docents each described training and continuing education as a form of learning in the development of their expertise. The docents participating in this study from the Atlanta History Center each described their training somewhat differently, primarily because they volunteer in different venues. Shelly, a docent at the Swan House explained her training:

Well, they have an official docent manual that gives you all the background on family and furnishings and they also have sort of a basic, sort of bare bones tour, with things they want you to cover in that tour and you read the manual and then you have to follow several tours and then once you feel comfortable to go ahead and give your own tours, you give it to the person who is the paid staff person at the Swann House and they give you the yea or nay and you go from there.

April, who serves at the Tullie Smith Farm, offers a similar description of her training at the History Center, but provides more insight into the new docent orientation:

“They do have a training thing and a lot of it is just working with the public type stuff. You know, dealing with handicaps and be polite, don’t insult people of foreign cultures, that kind of stuff.” She continued by explaining that the remainder of the training was less structured and included a handbook and suggestions for developing a tour format or script. April also described the use of continuing education, and although she notes it was infrequent, she did value the programs: “I think it's important to have refreshers because sometimes you do pick up inaccuracies or you do pick up things from other people or you forget things and you kind of incorporate them in your tour.” She continued, “You might be inaccurate or you might have forgotten something so even though you've been here a while, it might be helpful to go over the tour ever so often.”

Finally, Mary Catherine explains that she was a docent at the History Center before the existence of formal training; instead, she recalled that “When I started at the Swan House I was given a manual and told to follow two or three tours and given my wings.” She continues, “It was a pretty set script. You weren’t necessarily encouraged to go off and do your own thing.” Once formalized training was implemented she attended programming that was designed mainly as an orientation for all volunteers, not just docents. She also pointed out that regularly scheduled training, although not currently used, was previously held every Monday. Today, that regular training has been eliminated due to budget and staffing issues and instead, training is provided in relation to new and visiting exhibits.

Melissa and Cindy describe the training at the Abigail Adams Historical Society as extremely informal, noting that there is no formal training. Even so, there are formal aspects to their preparation. Melissa explains that there was a formal get-together for new

docents that included a chance to “see the house and go around and everything and to ask all the questions that we needed to ask.” Moreover, Melissa states that docents are given a manual. She also describes job aids that are available to docents during a tour or for preparation for tours. Melissa explains that index cards are used throughout the house with information relevant to the items on display:

In other words, if you find you find a plate and on the back will be a number, kind of a catalogue number and then if you find the cards that are in the same room that that item is in, you can look up the number and then it will give you a description of that item. You know, who gave it, where it came from, you know, is it old? Is it new? So everything is pretty much, you know, there’s, I don’t think there’s anything in the house that we don’t know or can’t find out what it is if someone asks us.

In contrast to the Abigail Adams House, the formal training at Boston By Foot is extremely rigorous. Each of the docents interviewed describe the training in a similar manner to Madeline: “Five Saturdays and there was a lecture in the morning and then there was a lunchtime breakout and then there was a fieldtrip in the afternoon,” but that was not all: “You had to write four papers and you had to have a final slide exam and then a practice tour.” Suzanna explains the weekly training: “It’s divided into the Colonial city, the Federal city, the Victorian city, and then the Modern city.” These Saturday programs are divided between a lecture given by an expert in a field such as architecture or history and then in the afternoon new docents participate in a field trip with a tour given by a more experienced docent. Suzanna states, “The guides actually do

the tour, and they will do it so people can ask questions. They go into the logistics while they are doing it.”

When speaking with David about the training program he notes that, “its not so much geared to the actual tours as it is to develop and give a background to people in architectural terminology. In a lot of the tours, docents who come on board are not architects by any means.” He continues, “It gives them a grounding in the architectural terms, terminology, style that sort of thing as well as integrating that into the history of Boston’s development.” Suzanna also remarked that sandwiched between the lecture and fieldtrip are lunchtime breakout sessions facilitated by experienced docents who cover a range of issues from managing unexpected situations while giving a tour to how to engage an audience. To supplement this training, new docents receive tour manuals that are geared directly to the tours offered through Boston By Foot.

There are lectures and field trips and breakout tables, but formal training does not end there. There is a formal evaluation and a final slide identification exam that is described by Suzanna: “You have to tell who the architect was, the building and where it is, just a little bit about the stylistic properties of it.” Once you have completed the course, returning docents are provided with opportunities to participate in formal continuing education. Continuing education events are held six times during the tour season and are designed and facilitated by experienced docents and tour of the month training is also designed and provided by experienced docents to add to the tours traditionally offered through Boston By Foot. With so many opportunities for formal training, from new docent training to continuing education, and tour of the month

preparation, it would not be unusual for a docent with Boston By Foot to participate in training programs almost year round.

The docents at the USHMM also go through an intensive training program for the museum's permanent exhibit, which includes a formal evaluation before beginning tours with the public. Docent training is conducted each week for five months and Joanna explains that "each week we'd come in and I think it was about three hours. We would get quite a few books, they'd give us books, and we'd have home work." She also states that she received preparation in how to present material to tour groups: "We would have people who, who knew the exhibits you know and take us around and show us how they would make the presentations." Bill recalls other components of the formal training: "People coming in all the time talking to us. We had film strips, we had, you know, a lot of supportive materials we could use and they kept giving us more materials and so on." Ashley shares how the trainer tied together all the course work and activities:

He [the trainer] had us looking at a section and writing about each section. He would say, how would you present this, how would you present that, what's important in this exhibit. So you really learned how to dissect the exhibits and then come up with the most important components.

Additionally, they shared with me insights into the formal training for additional tour programs including the art and architecture tour, *What Makes This Building Talk*, as well as, *Remembering the Children: Daniel's Story*, *Law Enforcement and Society: Lessons of the Holocaust*, and *Organizing History*. The participants described training for these programs that was similar to the permanent exhibit program. The primary differences were the length of the training, and special attention given to helping docents

understand the audiences the tours are geared to and how to present material and formats unique to the tour. For example, Ashley describes the preparation for *Daniel's Story* as including how to interact with children and parents, and Joanna expressed what she gained in her art and architecture training: "I learned all about the building and about the architect and why it was built like this."

Informal and Incidental Learning

The participants in the study described a range of learning activities that fall under the heading of informal and incidental learning. These learning processes took the form of learning from others, self-directed learning, and learning by doing.

Learning From Others

Participants at all of the institutions in the study expressed the importance of learning from others at their museum. Through observation, shadowing, and modeling the participants were able to develop their own knowledge and skills as a docent. At the USHMM, Joanna found she learned from a variety of things, but stresses the role of learning from other docents and staff at the museum:

I learn from other people a great deal, that's why I like shadowing. If I didn't come in for a long time and then I'd go back I'd shadow, because I like to pick up something and I forget. You learn from others, you do. I like to do that.

When I asked Ashley why she placed such importance on shadowing and observing others she said, "Well because you can learn tricks from them, tricks of the trade, now you know, especially in a permanent exhibit, they know what to go to and what is interesting, or what might be interesting."

David described shadowing at Boston By Foot this way, “Shadowing around is one of the things I stress for new docents.” He continues, “It is important to do because before they develop their own style it’s nice to experience the style of others in terms of how they speak and how they present.” When asked if he too gained from shadowing others, David said yes, “We had some, a couple powerhouse guides, that I took practice tours with and they had some great information, and just a style.” Cindy too relied heavily on shadowing, and for her it was a family experience. Cindy recalled how she prepared to serve as a docent by observing her mother: “I used to come and sort of just sit with her the days she would be here and just sort of learn..”

For Suzanna, having a mentor who modeled a successful tour was a source of learning. I asked her if any of the other docents at Boston By Foot were influential in her development. She states, “One of them I got to know well enough that I was able to ask her questions.” When asked to describe an instance where her mentor aided her learning, she continued,

She is the one that told me, what you need to do is a certain style has a lot of features. Narrow it down to three and show the same three features in several buildings along the way so that people get an idea what to look for. And I have found out that it works pretty well.

In addition to the mentors Suzanna turned to at the onset of her service, learning from peers continues to enhance her knowledge and skills as a docent. At Boston By Foot docents have access to an Intranet system to exchange information with others, “In our group a lot of us just exchange even emails, back and forth.” In particular, Suzanna relies on her peer docents to filling the gaps of her knowledge: “If you know somebody

has a particular interest, like David is really interested in contemporary architecture, I know a little bit, but if I had a specific question I would probably ask him about it.”

April too finds shadowing a useful tool in her development as a docent. She notes that because of the format of the tours and layout of the Tullie Smith House, she was able to overhear other docents in the midst of giving a tour, which was also a source of new approaches and information. She explained, “I still find it interesting to overhear another person's tour. Sometimes you're reminded of something you forgot or you hear a way of explaining something that you might not have put it yourself, you say, I've got to remember.” Incidental learning such as what April describes is also seen in the visits the participants make to other museums and historic sites. They often stated that they don't take tours to watch the docents, but nevertheless they often walk away with new insight. For example, Melissa shared her thoughts on a trip to Williamsburg, Virginia:

My husband and I, we appreciated when they had to do their spiel, you know they're the same thing for every person and recite all their facts and stuff which is great, but we really appreciated the people that could do it with a very interesting voice and hand gestures and made it more theatrical. Then I really appreciate it when you can feel you could ask them a question and you're not bothering them or they're not like, we've got to get to the next room.

Whether purposefully observing fellow docents or by watching and listening to others and gaining knowledge through incidental means, learning from others was a key component to the development of the participants' expertise. Madeline sums up the significance of others in her work as a docent this way: “I personally find that you can

read everything in the world, but my inspiration has been guides. I have gone on their tours and I have loved what they've done and they've just inspired me." She continues,

I think okay, I'm going to do that or what an interesting thing to do or the opposite. I've been on some tours and I'm like, wow, I wonder why they did that, so there's just no substitute for following and going on as many tours as you can.

Self-directed Learning

Another form of informal learning undertaken by these expert docents is accessing media such as books, films, television, and the Internet. All but two of the docents emphasized the use of reading materials in their growth as a docent. Although some of the docents noted that the assigned or recommended reading of the museum was important, it was the extensive independent reading that was a key learning trait in the participants. "I read other books that are related to it or just as things come along that are somewhat related to this period in history," Shelly states, "I have a heightened awareness and just sort of read on my own." She further explains why this form of learning is significant: "I think just to keep it fresh and interesting I think the broader base of knowledge that you can bring to it is important." The notion of broadening their knowledge base beyond what is required for a tour is also echoed by Melissa, who found she sought:

Every single book I could find on Abigail Adams and the Adams or at least Colonial life. Now, after I read all the Adams books the last couple of years I've been buying books on Colonial living, that way I'm learning more, just general life for everyone in colonial times. Whereas with the first books I was reading I

was trying to train myself on how the Smith's would live, but now I try to broaden that to all Colonial life.

Several of the participants spoke of building large personal libraries and seeking out books related to the themes of their tours. For example, Rebecca boasted, "You should see my library, I have a wonderful library," and Mary Catherine stated, "I go to old book sales and I buy old history books on the periods or having to do with the pertinent material." Others like Suzanna joke about the addictive nature of reading, "I do find myself buying a whole lot more books than I should."

At the Abigail Adams House and the USHMM, docents shared how participating in a book club helped to enrich their work at their museums. Cindy describes the book club, which includes docents and Historical Society members: "It's amazing and you get into it and really love it. It's a very sharing group for the most part. You want to share information. It's not about one-upmanship or who knows more, or anything like that."

Bill sums up the sentiment of the docents and their need to read anything related to their work as docents:

I have found that since I have become a docent volunteer here that I've gone back to reading history that I once read, but then did not put to use because I was teaching U.S. history or was teaching Ancient or Medieval history, you know. I did not teach twentieth century European history, so the knowledge that I had in that area sort of went by the boards and since I've gotten here I've found I just have to read, read, read, and read because there's just a lot of things I just need to know more about.

Participants in the study also identified television and films, and to a lesser extent the Internet as sources for gaining new knowledge. Many of the participants mentioned programs such as *Colonial House* on PBS. In addition to television and films, Rebecca also draws from public programs at the USHMM. She and her husband are members of the museum and when asked about her participation in these programs she said, “I think the broader your education can be the better docent you can be cause you can bring all that, synthesize all that information.”

Learning by Doing

The third form of learning expressed by docents was learning by doing. No matter how much training and preparation they received, all the docents in this study described a need to get out there and just do it. This learning by doing approach included practicing in preparation for a tour or gaining experience through the process of giving tours over time. When I asked Shelly how she developed her style of delivery she replies, “I guess it just sort of came over time.” When asked how she developed her own expertise and knowledge she replied in a matter of fact way, “Probably experience. I don’t know you can do anything else. I don’t think you can prepare for it.”

Similarly, Madeline explains why repeated practice and delivery of tours was important because oftentimes something derailed the standard plan or script: “You just have to learn, okay I’m going to cut this out or um, maybe we’ll just do a sentence or two on this, or skip this all together.” She further stated that she doesn’t think most new docents just start giving tours without practice. Instead, “They grab a friend or family or someone off the street.” Grabbing friends and family is exactly what Joanna did: “My first tour of course, my husband and my two good friends, my girlfriend who’s a docent

at the Hirshhorn. I said you and Don are coming down with me because I have to practice on somebody.”

For Mary Catherine, practice is not simply about repeating a tour over and over. Instead she has a process for preparing for a tour that involves considerable independent practice. “I will study. I walk through and go through my mind what the wording is going to be and then I go back and do the writing it out and letting it through [my fingers], make sure I have the wording.” David also gains something from the process of practicing for a new tour. He explained his preparation for a special tour of the month: “I often do walk the tours. I walk it a couple of times to sort of get familiar with the route and figure out where you are going to stand.” This preparation is important because, “Depending on the time of day you often want to be sure that, people are either in the shade, or the sun depending on whether it is winter or summer.” For Ashley, preparation and practice was critical to making her feel confident in her abilities. When she got ready to give the art and architecture tours she states, “I would really practice that a lot. I practiced that more because you really have to be able to project and get people involved, so I did do that.”

A unique form of learning by doing was discovered when I interviewed the docents of Boston By Foot. The more experienced and seasoned docents participate in training other docents, both new and returning. As a result, docents like Madeline develop their own knowledge base by teaching others. Madeline describes the impact of such a program:

It kind of jump starts you every year even though I, all through the winter, am going to lectures and keeping up that way, I find it's just a really good way for me

to learn because you're teaching these people how to be guides and they'll ask you such good questions, you're like, "wow, you know, I never thought about that". Or, "you've got to be kidding", so, no question it really helps me. Always thinking of how to explain to them or show them or relay good stories from tours that I've been on and all that kind of thing.

Additionally, experienced docents at Boston By Foot have the opportunity to design and write new tours that become tours of the month and sometimes permanent additions to the organization's offerings. Suzanna found that the experience of research and writing the material, as well as being responsible for training those who will present the tours is a great learning experience. She explains: "Designing one does not sound like a big deal, but when you sit down to do it, it's a process. So you know I learned a lot from that."

Finally, several of the participants described learning by doing in terms of time. April states, "I think it does take experience. I mean I like to think I'm better at this than when I started. There's just a huge amount to learn and if nothing else it takes time to learn all this stuff." Joanna as well, points to the role of practice over time in her growth as a docent, "I think experience is wonderful. It takes time. I don't think you can become an expert docent over night, your way of speaking, all this takes time. I get so much out of my tours."

This section addressed the question: What kinds of learning experiences lead to the development of docent expertise? Participants described two forms of learning that lead to the development of their expertise: Formal Training and Continuing Education and Informal and Incidental Learning. When participants described how they developed their expertise and knowledge as it relates to serving as a docent, they offered a variety of

learning experiences from training and continuing education sponsored by the institution, to learning from others, self-directed learning, and learning by doing.

Museum Context

Interviews with the participants revealed that learning in relation to the physical context of the museum or institution and the emotional-social context of the meaning behind the information addressed in the tours and exhibits are an important part of their developmental process.

Physical Context

Physical context includes the size, layout, and format of the exhibits, objects, and institution, as well as barriers that arise in relation to those concepts. Throughout the interviews and during my observation of tours it was evident that the physical context of their work as docents impacts their work and learning.

In one case, April describes how the renovation of the Tullie Smith Farm at the Atlanta History Center forced her to change how she conducted her tour. She explains: “They're doing all this construction work and there's noise and sometimes it's just not very pleasant out, so if I'm out of the house for a long time then you know you don't have as much time in the house.” As a result, “If you come right in you do know you have longer to spend in the rooms, so you get a feel for where you are.”

Because the tours with Boston By Foot are not conducted in traditional museum buildings, docents for this institution find that physical context is more significant than for other traditional docents. During a Boston By Foot tour you cannot barricade a tour group behind walls and glass. Visitors and guide stand along the sidewalk, dodge traffic, and navigate pedestrians, homeowners, and even Secret Service Agents. Suzanna shares

a story of how the context of such tours can be a little unnerving. She began by stating that a man, not in her tour group, “was just walking by and decided that I was maligning the character of General Hooker.” She continued,

I was talking about the statue of Hooker in front of the State House. I was talking about his Civil War history, and I had said he had lost battles and he had. He had lost his command because he had lost these battles. This person was just, he was just horrified, he really liked Hooker and he thought he had contributed greatly to the cause and it was, “oh, gee how do I get away from him?”

Madeline also expressed the impact of the Boston By Foot format has on her work as a docent. She described for me a tour in which a woman in a wheelchair was in attendance. Because of the narrow streets, stairs, and old often brick sidewalks, Madeline found herself challenged to invent her tour on the fly. She explains, “It was just very stressful because I kept thinking, okay we can’t do this, we can’t go in here. I had to restructure the entire tour.” She continues, “We had a great time, but on the same token I was constantly trying to think, is this something we can do and between the heat and the hills and the narrowness and everything, it was quite a production.”

At the USHMM, the size of the institution is very significant to docent learning and to their work. The permanent exhibit alone occupies 36,000 square feet on three floors and hundreds of volunteers and paid staff serve the public in more than a dozen departments. Ashley comments on how confusing the museum departments can be: “It’s difficult at the museum because they have all these different programs and they don’t communicate among programs so, I still am confused as to, is this education, what is, and who does what.”

Rebecca found the size of the institution inhibited opportunities to learn from peers. She often felt isolated and had to become more self-directed in her learning: “They need to do more in terms of making the group feel cohesive and allow the group to learn more.” For Bill, the size of the museum became a barrier to doing his job as a docent: “I haven't done as many tours as I should have because of my physical problems, unfortunately, which has been a big disappointment to me because I like doing the tours.”

In contrast to the USHMM, the Abigail Adams Historical Society is extremely small. Because of its small scale, its short tour season, and fewer tours, docents are faced with less opportunity to practice and hone their skills with visitors. If a new docent is scheduled to give four tours in a season and they have a total of ten visitors on those four tours, then a docent is challenged to develop their expertise in different ways. Melissa explains: “It takes a little bit longer probably to get your feet wet, like I said because of the short season and everything.” Cindy describes the size of the organization as both an asset and a detriment: “We don't ever meet as a group and say, what are we focusing on? Again it is casual and lax, and I think that could be a downfall.” But she also points out that because of the small size, the atmosphere is welcoming and docents are given a significant amount of freedom and responsibility.

Emotional-social context

Beyond the format and physical influence a museum or organization has on docent learning, the participants described a deeper emotional and social connection to the institutions they served. Whether it was the content, the organizational mission, or the people they worked with, the docents expressed a strong personal relationship and commitment to what they do. Emotional-social context is the connection a docent has to

the museum as a result of some historical, social, or personal relationship and it is the social/historical frame that leads to the emotional bond between docent and museum.

Ashley is an example of the deep commitment between a docent and her work. She felt an emotional-social connection to her role as docent because of her personal relationships with Holocaust survivors: “This is one place I have my heart in. I had family in the Holocaust and I do know a lot of people who are Holocaust survivors. It means a great deal to me. It’s ingrained in my soul.” The emotional-social context influences docent learning in that it strengthens their need to present information and facilitate tours that are historically accurate and meet the standards set by the institution and the individual docent. When docents felt a bond to their work and the museum they strove to move beyond formal learning, and sought out more knowledge and opportunities to practice and develop docent skills.

All the docents interviewed at the USHMM described their work and commitment to the institution in relation to an emotional-social context. Rebecca has worked at the USHMM from its inception. Her commitment to the mission of the museum and her own cultural and religious beliefs were expressed through her passion for the USHMM and in her response to why she choose to volunteer:

I think first of all you have to care in your own heart. I was thinking why am I a docent at the Holocaust museum and not at the Hirshhorn or, you know, the National Gallery? I think this emotionally fills a need in me. I’m not paid for it, so it’s not something I have to do. So I think my choice of museum primarily was that it must fill an emotional need because I could just as easily taken the training elsewhere and then be a docent with my friends. That is it for me; I think that’s it.

Joanna wanted to work at the USHMM since its inception and identified the historical significance and the mission of the institution as key to her dedication and sense of obligation. She identified her emotional connection to the USHMM by stating, “To me it’s a very emotional thing. I can’t be objective. It means a lot, so I felt, in fact each time I come I get something out of it.” She continues, “ If I touch one person I felt like I’ve succeeded in doing something, in telling the story and it’s, none of the other museums are like it, which I love.” For Bill the emotional-social context of his work as a docent was not influenced so much by religious and cultural beliefs as with the other docents from the USHMM in the study. Bill is gay, and his sexual orientation and his emotional connection to the Holocaust is most likely a result of a larger sociocultural/historical frame of oppression and marginalization.

In Suzanna’s case she had created bonds that went beyond professional relationships and developed friendships that created a deeper commitment to Boston By Foot. It took an injury for her to see the connection she had long felt to her fellow docents at Boston By Foot. “The group has been the supportive people in my life. They have been the ones running errands for me and stuff.” She went on to express a feeling that is best described as withdrawal, “I have missed it and it’s hard in the winter. That’s why we have this group off-season that works on other tours for the next season.”

Since the Abigail Adam Historical Society also closes for the winter, Cindy and Melissa describe a similar sense of disappointment, and they look forward to a new season with great anticipation. The passion these women feel for the house is directly related to their experiences as community members and is influenced by their childhood. For Cindy and Melissa, growing up in the shadow of Abigail’s home and their families’

history of volunteering for the Society sets the foundation for an emotional-social commitment to the Abigail Adams home. Cindy explains that there is a sense of obligation to the house and its history, “You almost get to the point where you say, oh, I’ve got to do this.”

The docents who participated in this study describe their work and learning in relation to the physical context of the museum or institution. Additionally, the emotional-social context of the meaning behind the information addressed in the tours and exhibits and an individual’s connection to the institution are an important part of their developmental process. Both of these factors were significant in supporting the docent characteristics addressed earlier in this chapter, and were found in relation to the learning processes participants described in response to the second research question.

Becoming an Expert Docent

An analysis of all the data collected in this study led to the development of a model based on the final question: What is the process for becoming an expert docent? The model in Figure 1 depicts the nature of docent expertise and consists of three parts: Dependence, Growing Independence, and Transcendence. Dependence is the first phase of docent development and describes a person’s dependence on others and information, such as scripts or formats. Growing Independence is the second phase and moves beyond a reliance on others. Instead, docents at this point are comfortable with their scripts, sometimes even adding new information, and work to improve their knowledge and skills through research, experimentation, and practice. The last phase in a docent’s development is Transcendence. At this point a docent is so in command of his material, that he has a sense of “ownership.” The docent at the Transcendence phase is secure in

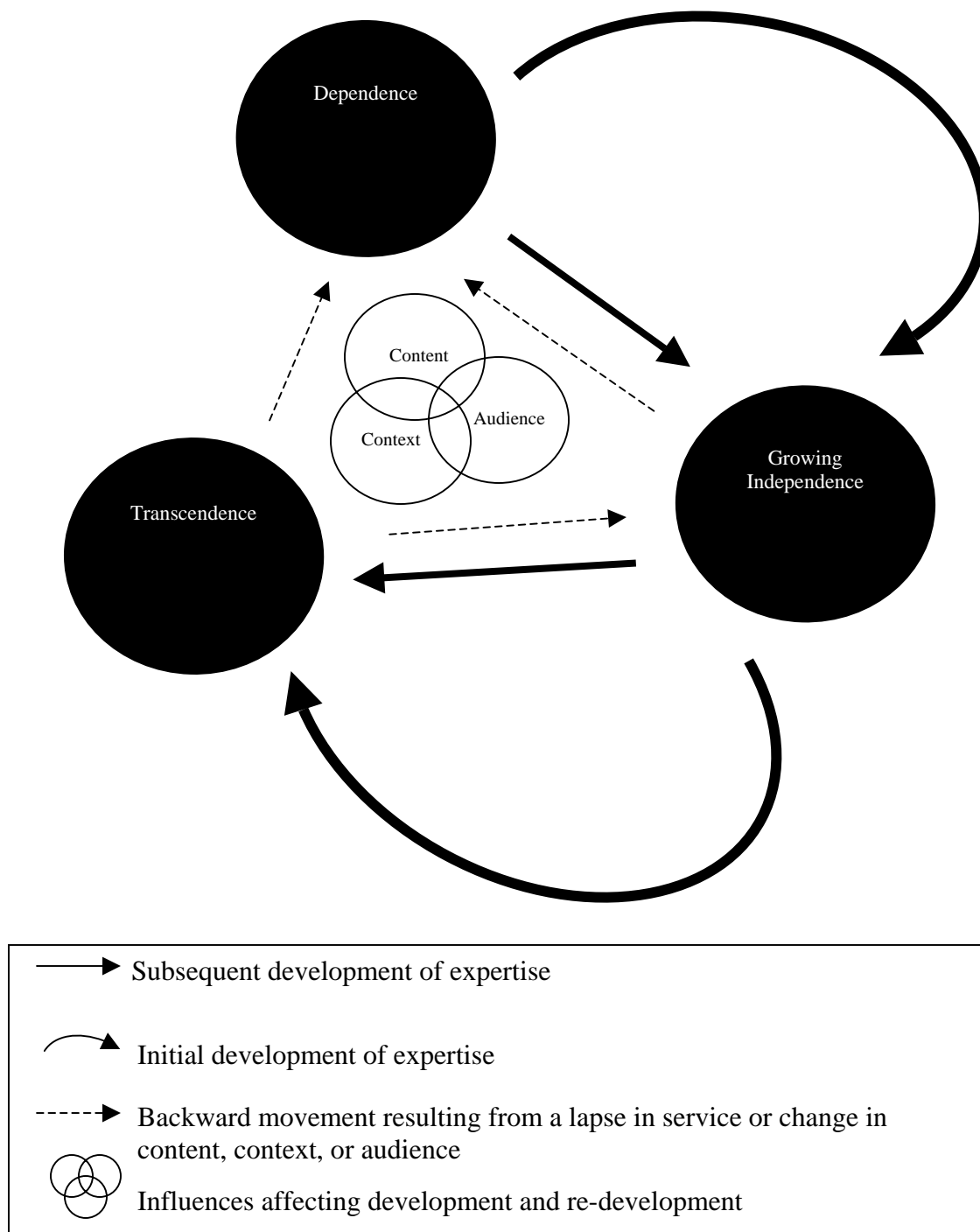
her knowledge and abilities to such an extent that she is free to improvise and modify a tour and intuition is trusted and followed. While they continue to add to their existing repertoire and knowledge through research and experimentation they are no longer conscious of what should be done, they just do it with a sense of confidence.

All three of these phases are influenced by three factors: content, context, and audience. When one or more of these factors are significantly altered or changed the result is a need for docent development. These factors are represented as overlapping circles and are related to content including the information a docent incorporates into tours or programs, such as exhibits, objects, and historical events. Contextual factors that influence docent expertise are the museum's format, location, and structure. Finally, the size of the group, as well as the age, gender and physical and educational needs of visitors are aspects of how audience influences a docent's expertise.

The interesting thing about this model is that while there are phases to expertise development, an expert docent at the Transcendence phase with hundreds of tour hours can just as easily find themselves back at Dependence. A return to Dependence would be a result of factors such as changing exhibits, taking on new tours, or significant additions or modifications to existing tours, installations, or programs. Docents at the Growing Independence or Transcendence phase can also move back a phase if they have a hiatus from service, but once a docent reaches Transcendence within an institution they will not return to Dependence, unless change to content, physical context, or audience occurs in their work.

Figure 1.

Cyclical Model of Expertise Development



For example, if an expert docent has been giving tours to adults about the antiquities displayed in a historic home and then begins offering the same tour to children the audience factor influences the docent's understanding of reading an audience, facilitating learning, and engaging visitors. This results in a return to the Dependence phase to learn and develop an understanding and approaches for working with children. The process can also occur if the same docent continues tours for adults but no longer gives a tour focusing on antiquities, instead addresses other content such as farm implements. Similarly, if the house is closed for renovation and the docent is forced into a new context, such as a traditional exhibit in a museum gallery, they again move back to Dependence.

A new docent begins at the circle labeled Dependence, and with time and preparation a docent moves to the second phase, labeled Growing Independence. This movement is illustrated with the large arching arrows. These represent the time and amount of work necessary to move to the next phase. If a docent has the necessary characteristics, skills, and knowledge the process continues in the same manner from Growing Independence to Transcendence, with the large, arching arrow again representing the work and time needed to transition. The model also illustrates re-development with movement between phases by expert docents when responding to a change in context, such as preparing for new exhibits or tours. This is represented with short solid arrows, demonstrating the more direct and less time consuming progression. Docents who have previously reached Transcendence will have to expend less work in less time to pass through each phase to Transcendence.

As indicated previously, reaching the Transcendence phase does not guarantee a permanent level of expertise. For docents working in museums the physical content, context, and the audience they work with are integral to expertise development. These influences are represented by three overlapping circles at the center of the model. When one or more of these factors is changed or significantly altered an expert docent moves back to Dependence, which is represented by a dashed arrow. Other dashed arrows are used to represent similar backward movement from Growing Independence to Dependence and from Transcendence to Growing Independence, which are a result of an absence of service or work.

Here is an analogy to explain this cyclical process. A novice musician can learn a piece of music, getting the mechanics down, read each note and has a dependence on the sheet music. Eventually the musician will be able to play that same music without reading the sheet music and may even experiment occasionally with the arrangement. At a certain point the musician has committed the music to memory, improvises, adding her own personal style. The musician begins to jam and change up tempos and keys, but still maintains the spirit of the original composition. If that now experienced musician is handed new music he does not simply change it at first sight, instead he repeats the same process from reading each note to improvising, but because of experience and a preexisting repertoire, this occurs in an accelerated manner.

Docents too begin with a script, feel a growing confidence when they have it down and finally are able to make tours their own with a style and content that maintains the integrity of the original tour, but is unique to the docent. It is when the tour must change or a new tour is added that the docent begins anew, but moves at an accelerated pace

toward the Transcendent phase. For example, Shelly an experienced docent at the Atlanta History Center, recalls her need to start over when the Swan House had been renovated: “When they brought all the furniture back and you have to kind of re-gear the tour then, I mean the basic information comes back pretty easily since I've been doing it for a while.”

Dependence

When a person takes on the role of new docent he or she first learns a technique and information by moving through a step-by-step process to accomplish the action. With the aid of training, observation, and independent or planned activities, docents prepare to facilitate tours and programs for the public. Even with extensive preparation, including formal training from veteran docents, paid staff, and visiting scholars, as well as informal learning such as independent reading, shadowing, and rehearsal novice docents have a sense of apprehension or even fear about conducting tours. Bill was well trained at the USHMM and described participating in activities and projects that broke the exhibit into manageable parts. Yet, even with his background as a classroom teacher, Bill was unsure of his abilities: “Even after going through that training, I still felt really insecure.” Cindy summed up the feelings of most of the docents in this study when she shared her feeling about her development: “From fear to comfort.”

One dimension of Dependence is a docent's reliance on a script or standard set of information. April shares how she depended upon her script and worked to commit it to memory: “When I first started I would recite it in the car as I was driving in.... When I was starting out you know, before you give your presentation in class you kind of go over it in your head.” David too leaned on his script when he began at Boston By Foot:

“When you do start out you know you are trying to stick to the script as it were and cover all the bases.”

Similarly, docents at this level show concern for knowing their content well enough to seem competent to the audience. Joanna expressed her concern at being able to remember and regurgitate so much historical information. She said, “I loved what I learned, I mean I was fascinated by the history which I knew very little of and they had some wonderful teachers, but I thought I’ll never be able to do this.” She continued, “I mean, how am I going to get up there for two hours and tell these people about things, what we went through sixty years ago?” For Ashley, learning the material meant taking what she learned in her training and committing it to memory on her own: “At home, just making sure I had all the facts, again, because for me just remembering this person’s name, dates, writing down little cheat sheets, because you’re really out there by yourself.”

Another indication of a docent at the point of Dependence is a reliance on others. At this stage, docents, both experienced and new, rely more heavily on others either to teach them what they need to know, or to show them how something should be done. This is accomplished through both formal learning, such as training from staff or visiting scholar and informal learning, as is the case in the following examples.

In one example, Rebecca shared a story of a student in one of her *Organizing History* Programs who asked her a question that she did not know how to react or respond to. After the program she turned to staff for not only input, but also a direct answer. Melissa shared the story of a novice docent at the Abigail Adams Historical Society who found observing others a necessity to her preparation:

I had my sister-in-law who was a brand new docent, she hadn't done a tour yet, but what I did was I told her to come while Cindy and I were doing a school tour and she just came, she never said a word, and it was great for her because she was really nervous about being a docent and she said that that helped her a great deal, being able to just come in and listen and walk around and be with us. And she did that for two or three or four tours with the kids and then when she went to do her day with me she said she couldn't believe how much more confident she was.

Growing Independence

Once docents have mastered the required materials and skills for their work they are able to move to the second phase of expertise development, Growing Independence. At this point a docent begins to feel confident in his or her ability to deliver accurate information to an audience. Experimenting with the original base knowledge and adding new knowledge, and building a repertoire of skills also define Growing Independence. Docents at this phase draw from both the formal and informal means found in the first phase, as well as utilizing situated or context based learning found in observation and practice.

This phase begins when docents feel a sense of confidence in the understanding and delivery of information they gained at Dependence. Melissa offers an example of this confidence. She explains that there is no predetermined starting or stopping point for her tour, instead the original, rigid process is replaced and, "I can do it all backwards and upside down."

The next step in this process is adding on to what is originally gained during formal learning opportunities. Madeline expresses how the notion of growth is key to a

docent moving out of a Dependence stage; once a docent has a solid foundation they can add to the baseline information. She states, “You kind of have to know how we got there [in history] and it is just amazing how everything just interrelates and I think people just kind of expand.” April also explains how she has laid a foundation on which she could try new things on her tours: “I know I’m going to talk about at least A, B, and C. Sometimes I get into D, E, and F and sometimes I don’t.”

The idea of expanding on a docent’s base knowledge is addressed by Suzanna. She said a docent should:

Continue to learn and pick up things from other people and is interested too in the accuracy and they are willing to do research, and they are willing to just continue to make an effort to improve on what they already know and they are not simply reciting it. They are interested in exploring other aspects and getting different takes on various topics. We have found that so many times you know you think you know something and then you go on someone else’s tour and they say something else, you think, well, where did they, how? And so it sets off a whole process by which you try, talk to other people and try to find out exactly how they arrived at what they are saying.

Transcendence

After leading many tours and years of practice, the actions of an expert docent are simply known in a non-cognitive way. As Madeline put it, “A lot is happening that I think I’m not aware of.” It becomes difficult for docents at this level to follow the original step-by-step sequence, and instead, as Joanna expressed, they simply “feel it” and make the tour their own unique product.

A significant component of the Transcendence phase is the role intuition plays in the docent's work. Mary Catherine calls it "a sixth sense," and found that there was no longer a script, instead, "you don't give them too much information, but you've got it at your finger tips" depending on the tour and the audience. Shelly too relies on her intuition to guide her tours, and emphasized that she did not start out knowing what an audience needed. "You develop it over time," and then she adds, "I take cues from how people are responding to different types of information and then I try to alter it as I go along." Madeline also discussed the role of intuition, and like several of the other docents, she found that she had an innate ability to know how much time she had remaining in a tour without looking at her watch. She states, "I don't know if that's something that I've developed or if it's innate and just never knew that I had it. I don't know if everybody has that, but I do."

Making a tour that is uniquely their own is another indication that a docent has reached Transcendence. As Shelly pointed out, she customizes each tour to her group; this was also the case for the other participants in the study. When asked about the changes in his own tour, David states that it was, "A lot less scripted now than it was because when you do start out.... In awhile you start to learn. You pick up from the group if they are really interested in specific or general information." Bill also found that he listened to his inner voice about how his tour should look: "You have to use what feels good for you to do, so I have changed a couple of things."

Many of the docents interviewed described making choices about what to include in a tour and what to skip. They made judgments based on their understanding of the mission of the institution and their own experience. One example came from Joanna, who

talked about her confidence in making choices for her tour groups, “At the beginning it is very hard to get there [the first floor], but after a while you think, I don’t have time to talk about the census, I’ll tell them about the Nuremberg Laws and who’s Jewish and who isn’t.” She explains that, “There are certain things that I don’t do,” and that making those decisions developed over time, “You talk about intuition, I have to ask myself are they going to be interested in this or not?”

This final section examined the question: What is the process for becoming an expert docent? Docent expertise development occurs in three phases: Dependence, Growing Independence, and Transcendence. Dependence describes a person’s dependence on others and information, such as scripts or formats. Growing Independence moves beyond a reliance on other and instead, docents are comfortable with their work and role to the point of adding to an original script and improving her or his knowledge and skills through research, experimentation, and practice. Finally, Transcendence describes a docent who simply acts, making judgments on content, delivery, and execution. The model in Figure 1 depicts the development of expertise by museum docents and illustrates the significance of time in the developmental process and the fluid movement between phases a docent can make when changes are made to content, physical context, or audience.

Summary of Findings

This chapter began with an overview of the study participants and their roles at the institution where they serve as volunteer docents. The chapter then addressed each of the four research questions. The first question was: What are the characteristics that define an expert docent? The characteristics of expert docents are directly related to their

skills as a docent, as well as personal characteristics that enhance a docent's skills. The characteristics of expert docents consist of: Facilitates Learning through communicating information, reading and adapting to the audience, and knowing the subject matter, Integrates Prior Experience, Demonstrates Enthusiasm and Commitment, and Maintains a Sense of Humor.

The second question posed was: What types of learning experiences lead to the development of expert docents? The first set of learning experiences were Formal Training and Continuing Education which involved programming sponsored by the museum. The second type of learning utilized by expert docents was Informal and Incidental Learning, including learning from others, self-directed learning, and learning by doing.

The third question asked: How does the museum context shape docent learning? The findings indicated that physical, emotional, and social factors contributed to learning by the participants. Physical Context addressed size, format, and setting of the institution in which the docent worked and Emotional-social Context addressed a docent's strong personal relationship to the institution, its mission, or its content.

The final question examined in this study was: What is the process for becoming an expert docent? In this chapter I described a model of expert development and re-development consisting of three phases: Dependence, Growing Independence, and Transcendence. Dependence involves new docents or experienced docents who are taking on new tours, exhibits, and information. At this point a docent is dependent upon others and the resources they offer to conduct a tour. The second phase of expertise development in docents is Growing Independence, which is characterized by a growing

confidence and a willingness to add to and experiment with the knowledge obtained in the Dependence phase. The third phase in the model is Transcendence. At this point a docent moves beyond doing the expected and incorporates intuition and experience to make choices concerning tour delivery. Each of these phases is influenced by three factors: content, physical context, and audience. When one or more of these are significantly altered or replaced then re-development must take place, demonstrating the fluid nature of docent expertise.

CHAPTER 5

CONCLUSIONS, DISCUSSION, IMPLICATIONS, RECOMMENDATIONS

The purpose of this study was to examine the nature of docent expertise. The study was guided by four research questions: First, what are the characteristics that define an expert docent? Second, what types of learning experiences lead to the development of expert docents? Next, how does the museum context shape docent learning? Finally, what is the process for becoming an expert docent? Twelve docents from four history-themed cultural institutions, The Abigail Adams Historical Society and Birthplace, The Atlanta History Center, Boston By Foot, and the United States Holocaust Memorial Museum were interviewed for this study.

Sample selection was purposeful both in the selection of institutions, and in the selection of participants. The museum sample was purposefully selected to create maximum variation based on the variety of museums, as well as the range of docent preparation at each site. The participants were identified as expert docents at each institution with the assistance of museum staff serving as key informants. Semi-structured interviews were conducted lasting between one and two hours each, observations of tours were carried out at each site and docent training materials were reviewed to gain further insight into museum processes. Follow-up contact by email elicited additional information and clarification.

The results of this study revealed characteristics common to all the expert docents and coupled with these is the significance of museum or organizational context on the nature of docent expertise. Moreover a cyclical model is proposed for the understanding of expertise development.

Conclusions and Discussion

The first conclusion of this study is that docent expertise is characterized by a combination of acquired and preexisting characteristics. The second conclusion is that the development of docent expertise is not a set of finite steps; instead it is a cyclical, fluid process. Last, context is integral to the nature of expertise.

Conclusion one: Expert docents have both acquired and preexisting characteristics.

The first conclusion of this study is that expert docents have a unique combination of characteristics, some of which can be acquired through training, development, and experience, and other preexisting characteristics, which museum staff must seek out, foster, and inspire in new docents. Although not all expert docents possess equal amounts of each characteristic, they are all key components in identifying docent expertise. These characteristics were utilized in all aspects of the research participants' work and as they described other expert docents. The characteristics of expert docents I have categorized as *acquired characteristics*. These include knowing the subject matter, communicating information, and integrating prior experience. Those I term *preexisting characteristics* include adaptability, enthusiasm and commitment, and sense of humor.

In studies of master teachers, knowledge and specifically subject or content knowledge, is a core component in expertise. Within expertise literature knowledge is often defined more broadly. Characteristics of master teachers tend to differentiate between knowledge of subject and teaching skills (e.g. Allen, 1987; Tsui, 2003), while knowledge in expertise studies can include substantive (Fook et al., 2000) or domain knowledge (Bereiter & Scardamalia, 1993) and procedural or action knowledge (e.g. Dreyfus, 1979; Dreyfus & Dreyfus, 1986, 1996; Ericsson & Smith, 1991). Domain or

substantive knowledge is knowledge about something, such as an historic place or time period. Procedural knowledge is skill based or knowing how to do something, such as facilitating a tour for children. Competence models make just such a distinction between the static domain knowledge and action oriented task knowledge, which, according to Herling (2000) implies “that *expertise* is a competence-level term denoting the potential for *doing something*” (p. 12).

In my study, participants stressed substantive knowledge. Mastery of content or subject matter is fundamental and without it a docent, whether expert or novice, simply cannot be successful. A master teacher, like an expert docent has a strong grasp of subject matter. Allen (1987) found that master teachers demonstrate superior knowledge of the subject matter, as well as information that is current and appropriate for the student.

For expert docents, knowledge includes an array of information related to tour and program content, and in relation to the greater subject or theme of the institution they serve. This most closely resembles Shulman’s (1987) description of teacher knowledge. He explains that subject matter knowledge includes knowledge of content within a discipline. Besides subject matter knowledge, Shulman’s study was an examination of pedagogical content knowledge, which is also described by docents in my study. Pedagogical content knowledge is the representation of subject by way of analogies, examples, explanations, illustrations, and demonstrations to increase learner comprehension.

Context-specific knowledge has been recognized by Gleespen (1996) who found that extensive and specialized knowledge is “required for excellence in most fields” (p.

502). Participants in my study stressed the vast amount and types of content knowledge expert docents must gain. This means taking and intertwining specific and general knowledge in the context of the museum to meet the unique nature and demands of each tour or program. Cindy explains that the knowledge needed at the Abigail Adams house must be specific to Adams and her family while simultaneously encompassing the greater history of the time period and geographic location in which Abigail Adams lived. She found that overall a docent must, “be really well versed” in their specific content areas and more generally have, “a sense of history.... because everything overlaps.”

The second acquired characteristic of expert docents is the ability to communicate information in an effective manner. This form of procedural knowledge is vital to docents and includes such things as making eye contact, speaking in an engaging manner, and varying communication approaches to meet the needs of various audiences. For the expert docent, facilitating learning through an ability to effectively communicate information is key to a successful tour for both guide and visitor. One example of expert docent communication skills is creating a dialogue with visitors through questioning techniques. Bill made use of the Socratic method to engage his audience and Rebecca noted that, “Asking provocative questions is a good technique for a docent.”

Like the docents in my study, master teachers have an array of verbal and nonverbal communication skills that are used to engage learners and to present information in a logical manner (Allen, 1987). Through communication, master teachers encourage questioning and stimulate creative expression and thinking (Allen, 1987). Similarly, Hewett (2003) found that in the learning process, master teachers are the

facilitator, not the “sage on the stage” and must encourage active participation and learning through strong communication skills that promote inquiry.

My findings are further supported by museum education literature. Falk and Dierking (1995) state that museums should be viewed as environments that encourage active participation and exploration, as well as serving as facilitators accountable for creating environments where this form of active learning can occur and positive visitor outcomes can be attained. Falk and Dierking (2000) recommend ways communication can facilitate learning in museums. They suggest creating opportunities for group dialogue during tours and utilizing stories to put learning in a human context. This means that a docent must have the ability to engage visitors through communicating information and ideas; such is the case with the participants in my study. Similarly, McCoy (1989) states, “when docents are skilled museum teachers, they use the best personal and instructional techniques to inform, involve, and excite visitors” (p. 149).

The third acquired characteristic of expert docents is the integration of prior experiences into their work. Participants in this study did not separate their experiences outside the museum with what occurs during their tours. In their interviews the docents described the impact of careers, such as teaching and previous volunteer work especially in museums, on their current docent practice. Participants also drew on personal experiences and situations when giving tours and working with the public, describing how past experiences influence their work as docents.

The significance of prior learning is recognized in museum education literature. In Falk and Dierking’s (2000) Interactive Experience Model the personal, social, and physical contexts of visitors in museums is addressed. Falk and Dierking note that

lessons derived from personal context are constructed from prior knowledge and experience. Additionally, when addressing physical context, they stress learning that is dependent on a person's ability to place prior experiences within the context of their physical setting.

The integration of a learner's prior experiences is also found in adult education literature (e.g. Caffarella, 1994; Knowles, 1980; Knowles, Holton, & Swanson, 1999; Lindeman, 1926). The idea that experience is a valuable resource and should be placed at the core of adult learning is central in the field of adult education (Brookfield, 1995). Jarvis (1987) asserts that learning is a "process of transforming experience into knowledge, skills, and attitudes" (p. 16). Caffarella and Barnett (1994) identify five reasons for the importance of experiential learning. First, a learner's background and life experiences provide the needed foundation for learning. Next, even if individuals have the same actual experience, means are constructed differently for each person. Third, learning involves active engagement. Last, the unique life situations of adults form a context for learning.

Integrating prior experience could be found in the personal experiences of expert docents, such as Mary Catherine's description of what she learned while attending a tour of a governor's mansion. Prior work or volunteer experiences were also integrated into the work of expert docents, such as Shelly's previous role as a paid docent. She clearly identifies her ability to serve as an effective docent in Atlanta to her previous role at Monticello. She draws from specific events she experienced while working at the historic site: "The experience I had there certainly prepared me to work at the Swan House."

All three of the acquired characteristics, knowledge of the subject matter, communicating information, and integrating prior experience are characteristics that can be developed through a range of learning opportunities. My findings are that expert docents gain skills and knowledge found in these three characteristics through both formal and informal processes. Similarly, a study by Castle (2001) found that museum educators used forms of formal training, observation, and self-directed learning. Her findings stress that the museums utilized a combination of theory and practice in docent preparation. This was confirmed in my study, but the proportion of theory and formal preparation to informal learning and practice varied greatly among the participant sites.

Unlike McCoy (1989) who found that training was central to a docent's effectiveness and ability to interact with and facilitate programs for a variety of audiences, the findings of my study indicate that training is not always essential in the development of docent expertise. Although formal educational opportunities give all learners a basic understanding of the formal and explicit knowledge found in the domain content (Tynjala, 1999), it was in the more informal learning process where the docent expertise took shape. Formal training for those at the US Holocaust Museum and Boston By Foot was integral to their success and development as docents, but at the Atlanta History Center and Abigail Adams Society, where formal training was secondary, the same caliber of expertise was found. This suggests that although formal training opportunities have merit and value in museums, it is through informal and incidental learning that the development of acquired characteristics flourishes.

As was noted previously, all the docents in my study used various combinations of formal and informal learning mixing museum sponsored programs and classroom

learning with docent initiated activities and preparation. Professionals learning in a work environment describe a similar mixture. Houle (1980) suggests that professionals learn by “study, apprenticeship, and experience, both by expanding their comprehension of formal disciplines and by finding new ways to use them to achieve specific ends, constantly moving forward and backward from theory to practice so that each enriches the others” (p. 1). This definition is expanded upon through a model of professional learning in practice that includes three overlapping modes of learning: instruction, inquiry, and performance. Performance is particularly relevant to the learning described by expert docents. Houle describes performance as more active in nature and involving practice within the actual work environment.

Such performance was a mainstay of docent development. All the theory and content knowledge in the world means nothing if a docent does not share it with an audience. Docents in my study described preparing for groups by giving practice tours to friends and relatives, and rehearsing while driving or speaking into a tape recorder. Even after gaining experience with a particular tour context, docents still found that while performance did not always make for a better tour, it did give them confidence in their abilities and opportunities for reflection and improvement.

Besides the acquired characteristics of having knowledge of the subject, communicating information, and integrating prior experiences, I found that expert docents are also defined by a set of preexisting characteristics. These include being able to read and adapt to an audience, enthusiasm and commitment to the institution or their role and performance as docent, and possessing and demonstrating a sense of humor. The notion of preexisting or inherited characteristics is discussed in a review of expertise

literature by Kuchinke (1997). He cites inherited traits including musical pitch, athletic ability, and personality, noting that such characteristics may serve as a prerequisite for the development of necessary skills. For example, Posner (1988) describes factors such as an individual's motivation and capabilities as influential to expert performance. The preexisting characteristics are, as Kuchinke (1997) describes, necessary since they influence a docent's role, work, and expertise development.

The first preexisting characteristic of expert docents identified in this study is enthusiasm and commitment. A characteristic passion is exhibited by what a docent does, how they prepare for that work, and how they share their work with others. Such a characteristic has been found in studies of master teachers and experts in other domains. Master teacher are characterized as having a love of the subject, and a joy in developing that same love in others (Epstein, 1981). Expert teachers have been found to "take school home" (McCutcheon, 1980) with them, by preparing for their work in the classroom in places like the shower or in the car. Likewise, expert docents did not rely on what was presented to them, simply taking information at face value. They took their learning and their preparation home with them by reading extensively, creating personal libraries, seeking out lectures and other forms of media, and studying not only the required curriculum, but also creating homework and activities for themselves in anticipation of tours.

Docents like Mary Catherine went so far as learning the K-12 curriculum standards for her state to be able to connect museum content to student learning: "I just wanted to make sure that when I was thinking about what I was going to say I wanted to make sure I was going to hit on the things that were necessary." Like the teachers in

McCutcheon's (1980) study, expert docents also demonstrated their commitment to their role through rehearsal and planning in informal places. April recalls using her thirty-minute commute to prepare for tours: "I would recite it in the car as I was driving in."

Bereiter and Scardamalia (1993) too found that many experts spend tremendous amounts of time and energy in their domain and set high standards of excellence demonstrating both commitment and enthusiasm. Likewise, in continuing education literature Daley (2002) describes a high level of involvement in certain professions such as nursing and law where a sense of responsibility is felt by individuals. Such professionals go beyond the call of duty to a level of involvement that influences self-identity. She gives examples of nurses describing their work as a calling or lawyers working for a greater purpose. In much the same way, docents in my study describe a deep commitment to their service and a sense of responsibility. Cindy expressed a strong feeling of obligation, as though Abigail Adams' home was pulling her in. Although volunteering there places demands on her life, Cindy does it because, in her words, "I'm contributing something." Additionally, Bob recognized that a sense of purpose was critical to his work as a docent: "I'm doing this because I think what I'm doing is important. I guess if I know I've changed or made a difference to one individual in that group I've accomplished something."

All of the expert docents participating in my study discussed their commitment to their work and shared examples of dedication, particularly in relation to gaining subject matter knowledge. A significant amount of personal time was spent acquiring knowledge and skills in preparation for the tours they presented and to support the broader mission of the institution that they served. While some had graduate degrees, few had degrees

directly related to the subject of their tours, indicating that the knowledge was achieved through commitment to the formal training provided by the museum and to independent and informal learning. The amount of preparation at times may have felt like getting a masters degree. This was true for Joanna who, when asked about her training for the US Holocaust Museum commented, “It was getting a degree in German history.” Likewise, Melissa commits a significant amount of time preparing each spring for the opening of Abigail Adams’ house: “I read the booklet over and over and then come spring, I read, or reread a book on Abigail and read my book over and over again just to get in the spirit again.”

The next preexisting characteristic of expert docents is the ability to read an audience and subsequently adapt to the visitors’ needs and interests. This characteristic involves a docent’s ability to be flexible, adapting to situations, audiences, and changes that impact a tour. Master or expert teachers have what Tsui (2003) describes as “an element of flexibility” (p. 28). That is the ability to anticipate the need for change, and have contingency plans for such situations (Borko & Livingston, 1989). The master teacher takes cues from her students, can foresee problems and make changes accordingly (Tsui, 2003). For example, in a study of expert teachers, Borko and Livingston (1989) found that the participants demonstrated their flexibility in their ability to use questions from students to generate further discussion, as well as the ability to produce examples quickly to clarify ideas. Moving beyond the required learning objectives, the master teacher instead considers the needs and interests of the learner in his or her approach (Allen, 1987; Westerman, 1991).

Docents in my study describe reading their audience and then adapting the stock tour to the needs and interests of the group. Similar to the master teacher, the expert docent gains the ability to change approaches based on the response of individuals. This propensity for adaptation is also addressed in studies of expertise and expert problem solving (e.g. Fook et al., 2000; R. Glaser & Chi, 1988b; Herling & Provo, 2000).

Bereiter and Scardamalia (1993) emphasized the significance of problem solving in expert knowledge. Anderson (1996) outlines the problem solving skills of experts as: (1) the ability to switch from factual knowledge to performance knowledge; (2) the capacity to use tactical learning, which employs the use of sequences to solve the problem; (3) the ability to create new constructs, which represent key aspects of the problem; and (4) the skill to recognize within problems, chunks, and patterns that are repeated in previous problems. Problem solving is further examined in relation to pattern recognition. Experts have been shown to be able to recognize larger patterns based on previous experience and use those to quickly solve dilemmas (Kuchinke, 1997). Cooke (1992) describes pattern recognition processes as “involving the identification of objects, scenes, words, sounds, and speech through the rapid encoding of external environmental input into an internal code that is associated with the stimulus” (p. 34). In other words, an expert, due to experience in a particular domain, is skilled at recognizing specific patterns related to their field.

In my study of expert docents, the characteristic of being able to read an audience and adapt can be seen in relation to research on expert problem solving and pattern recognition. Based on the expertise literature, it is clear that expert docents not only possess similar characteristics, but such characteristics cannot be taught. For a docent,

problem solving can include resolving an array of situations based on contextual issues. Discrepancies between what was planned and what an audience needs or wants is one problem. Another is addressing problems created by physical barriers like Madeline's tour through Beacon Hill with a wheelchair bound visitor, or April's experience of giving tours around the construction and remodeling of Tullie Smith Farm.

When examining problem solving it is useful to consider it in relation to learning theory. Anderson, Pirolli, and Farrell (1988) found that in the case of computer programmers, individuals did not learn from abstract instruction, such as from textbooks, instead they learned when faced with the challenge of solving a problem. Through experimentation an expert can draw from all of his or her psychological faculties to solve a problem by doing. Learning by doing is taken up in adult education. Situated cognition is centered on the notion that learning and cognition are fundamentally situated (Brown, 1989) and according to Reynolds, Sinatra, and Jetton (1996), arose from efforts to explain how an individual learns in a "conceptual environment." Situated learning and its relationship to context are further discussed in the final conclusion.

The final preexisting characteristic of expert docents is maintaining a sense of humor. This characteristic was described often by participants in my study and was critical to how they approached their work and their role as docent. Sense of humor is not found in any of the studies reviewed in my research. This may be a function of how it is categorized by researchers or may be a reflection of the nature of volunteer docents. Previous studies of experts include professions such as airline pilots (Dreyfus, 1979; Dreyfus & Dreyfus, 1986) and nurses (Benner, 1984; Daley, 1998), and master chess

players (Chase & Simon, 1973) with tens of thousands of playing hours. These studies focus on skill acquisition not expertise development and as such provide little comparison to museum docents who voluntarily give time to museums for social, educational, and leisure purposes. Hence, it seems appropriate that having and maintaining a sense of humor has not previously been discussed in the literature.

One reference that does lend support to my finding is found in Joan Erikson's (1988) ten attributes of wisdom. She includes humor stating that having a sense of humor keeps a person grounded and helps in managing the complexities of the world. She goes on by saying, "When we can see ourselves as funny, it eases this daily living in such close proximity with ourselves" (p. 182). This resonates in the stories of the docents in my study. Suzanna's run-in with a rat meant she could stress out about a rodent interrupting her tour or she could laugh it off and distract her visitors. She chose the latter. Mary Catherine best summarized the importance of humor for a docent: "While it is a good thing to take the job seriously, a healthy sense of humor and sense of the absurd helps me from taking *myself* too seriously."

Conclusion two: The process of expertise development is cyclical and fluid.

The second conclusion drawn from this study is that the process of docent expertise development is cyclical and fluid in nature. This conclusion is represented in a model incorporating three phases: Dependence, Growing Independence, and Transcendence. The first phase, Dependence describes a person's dependence on others, including people and information. This initial phase includes novices and those docents new to a context who must depend on other people and the information and guidance they provide for preparation. Docents in a Dependence phase have either limited experience or none at all

given the new context and as a result they must rely heavily on their learning. This finding is supported in expertise literature. Daley's (1998) study of expertise in nurse practitioners finds that to form concepts novice nurses spent a significant amount of time and energy taking in information. Examples of learning at the Dependence phase include formal programming and directed study sponsored by the museum, as well as mentoring and shadowing, rehearsal and practice. With a dependence on others for information and processes, well-developed and supportive learning opportunities are critical at this phase.

Mentoring is the process of people helping others increase their chance of success by advising, guiding, and encouraging (Vincent & Seymour, 1994). More importantly, mentoring, as described by Hill and Bahniuk (1998) is a communication relationship that can help influence and socialize a protégé. It is that relationship, either in formal or informal settings that may assist in the training and development of docents. Mentors provide the psychosocial function that Kram (1983) characterizes as acceptance and confirmation, as well as acting as interpreters of the environment (Daloz, 1998). In this role, mentors introduce learners to the new setting, interpret it for them, and assist them in learning what is necessary to succeed in the environment (Abu-Shumays, 2002). Furthermore, when novice docents take part in shadowing tours, mentors model behavior and language within the learning context. This activity encourages docents in a Dependence phase to gain the knowledge and skills necessary for developing full participation in the practices of the museum community (Lave & Wenger, 1991).

Growing Independence is the second phase and moves beyond a reliance on people or things to a point of comfort with scripts and procedures. Docents at this phase

sometimes add new information, and work to improve their knowledge and skills through research, experiential learning, observation, and practice. In Growing Independence docents are beginning to learn from experiences through their encounters with the public during tours and programs and make connections between what worked or didn't work and future attempts, and begin to take on self direction in their learning.

Such learning is addressed in context-based learning. Hansman (2001) examines mentoring, coaching, and on-the-job training (OJT) as examples of situated cognition in the field of HROD, and in general, cognitive apprenticeships and communities of practice. Docents in a phase of Growing Independence can work with others on the job to gain context related knowledge and skills (Jacobs & Jones, 1995). Baron (1997) and his colleagues note that such a method can be structured or unstructured, as well as general or specific in relationship to skills acquisition. The use of OJT for developing specific skills is particularly relevant for expert docents in Growing Independence.

Self-directed learning (SDL) is a practice involving individuals taking initiative for determining their learning needs, developing learning goals, identifying materials and resources, selecting and implementing learning strategies, and evaluating the results of the process (Knowles, 1975). The process of SDL in the latter end of Growing Independence most closely aligns with interactive models found in adult education literature. Learning in these models is described as not well planned and often involves finding learning opportunities arising from the environment and context, personal characteristics and traits, and learner cognition (Merriam & Caffarella, 1999). Examples of interactive models include Spears (1988), and Brockett and Hiemstra (1991). Beyond these models is

also the notion that some adults are naturally self-directed and as a result pursue learning interests and needs independent of organized learning. Hiemstra and Burns (1997) describe these individuals as Independent or Self Oriented.

Self-directed learning processes involve individuals taking “the primary initiative for planning, carrying out, and evaluating their own learning experiences” (Merriam and Caffarella, 1999, p. 293). For docents this may be an extension of their everyday life and characteristic of their learning style. Their self-directed learning involves further research on a particular time period, objects, or subjects related to their role as docent and may include seeking out books, television programs, experts, or finding information over the Internet.

The third phase of the model is Transcendence. This phase is exemplified in docents who have command of their material and are secure in their knowledge and abilities to such an extent that they freely and easily make judgments on content, delivery, and execution. Docents expand on their self-directed learning and begin to reflect and experiment. Examples of learning in Transcendence include learning by analogy (Rumelhart & Norman, 1981), which results in the acquisition of new knowledge structures from old ones. Individuals have schemata or procedures that identify things in the environment that are relevant to that concept (Borko & Livingston, 1989; Rumelhart & Norman, 1981). Relationships between the known and the unknown cause an existing schema to activate. The new schema is then replicated from an existing schema. Docents in the Transcendence phase are able to find patterns, make sense of, and address situations in their current context more efficiently. Like the teachers in Borko and Livingston’s (1989) study, docents in Transcendence have better schema development

because they have more schemata to draw upon for facilitating tours and better schemata for the subject matter knowledge for providing visitors explanations to inquires.

Experimental learning is addressed in Jarvis' (1987) model of the learning process. Experimental learning is described as a higher form of learning requiring more learner involvement and is a result of a learner experimenting with her or his environment. It also describes a more proactive then reactive approach to learning and involves learners trying out solutions to problems confronted in practice (Jarvis, 1987). Such learning is undertaken in Transcendence.

Another form of higher learning outlined by Jarvis (1987) is reflective practice. Reflective practice (Schön, 1983, 1987, 1991) provides practitioners an opportunity for critical examination of practice and a chance for self-examination leading to the application of broader problem solving skills. In a broad sense, Schön (1983) defines reflective practice as a method for practitioners to develop a greater sense of self-awareness about their performance, specifically, how they do their job and the impact on their work. As a result of this practice, reflection provides awareness for growth and development. Reflection, as outlined by Schön (1983, 1987) involves knowing-in-action and reflection-in and on-action. These concepts are a result of the notion that real-world problems do not present themselves as organized arrangements and require a practitioner to construct a path for addressing the situation using previous experience and knowledge. This act involves what Schön (1987) describes as improvisation, invention, and testing of strategies created by the individual. The practice may demand the selection of actions based on "conflicting appreciations" and involve integrating multiple theories, experiences, and solutions.

By integrating reflection into their work docents at the Transcendence phase build onto their practice by learning from their mistakes and adapting in the future. Through reflection in and on action docents are able to confront situations that might arise and “take on a much more autonomous posture on how these problems might be solved” (Wildman, 1990).

While the model I propose presents a progression from Dependence through Transcendence, it is not a ladder with a final level of expertise to be obtained like those defined by expert’s ability to develop skills. Dreyfus and Dreyfus’ (1986) Skills Acquisition Model suggests that individuals learn through practice and develop skills progressively from novice to expert. Novices are inclined to manage their practice with the use of rule-oriented behavior. This dependency on rules allows a novice to function without the benefit of experience. The rules give novices clues on how to take action, perform, or make a decision. The second stage is termed advanced beginner and describes individuals who as a novice had considerable experience in real situations. With this experience they are able to consider more facts and rules and have a better understanding of which skills are relevant in a situation. Competence is the third stage on the model and identifies individuals who take what was gained previously and add to it instruction or additional experience useful in adopting a hierarchical perspective. A learner at this stage is also faced with a sense of responsibility for his or her decisions. At stage four, proficiency is identified and an individual is able to assimilate experience in a way that results in intuitive behavior instead of reasoned response. This results in easier action by the learner, less doubt, but still demands decision on the part of the individual because she or he still lacks enough experience with a large range of possible

actions in varied situations. The last stage of the model is expert. An expert is a person who, through experienced and practiced discrimination of situations, is able to discern what needs to be achieved and how to achieve it.

Benner (1984) suggests a similar skill acquisition model based on the embedded knowledge found in the practice of clinical nurses. Benner contends that expertise is most often developed in real world settings rather than traditional formal learning settings. “Know how” is acquired through a five stage sequence, much like the Dreyfus’ model. The stages include: novice, advanced beginner, competent performer, proficient performer, and expert.

While the models of Dreyfus and Dreyfus (1986) and Benner (1984) examine how expert *skills* are developed, my model addresses the nature of expertise in relation to context and what happens after an individual has reached an expert level. I assert that models that focus on skill attainment fit within the phases of my expertise development model. For example, the Dreyfus’ levels of novice and advanced beginner can be found within the Dependence phase, competence in Growing Independence, and proficiency and expertise in the Transcendence phase.

What Dreyfus and Dreyfus (1986) fail to incorporate and Benner (1984) fails to develop is the impact of context on the process of expertise development. My study found that content, as well as the audience and physical context are critical to how docents develop expertise. The nature of previous studies of expertise, although useful in illustrating processes such as medical-judgment tasks (Camerer & Johnson, 1991) it do little to demonstrate the fluid nature of docent expertise. Skill development models indicate only an upward progression from novice to expert. Dreyfus and Dreyfus (1986)

and Benner (1984) concentrate on skills that can be performed automatically and through intuition, such as flying a plane or playing chess, but not all expertise involves such skills, or such consistency in context. Their work portrays expert performance rather than expertise and a clear distinction needs to be made between the two (Tsui, 2003). With an emphasis on rules, such studies lack consideration for the impact of content knowledge on expertise development. The focus is on skills, practice, or performance, and as a result the impact of context change on content knowledge is ignored. In fact, Dreyfus and Dreyfus (1986) characterize expertise as “knowing how” not “knowing that,” and as a result models such as theirs provide only one angle of examining the development of experts.

Conclusion three: Context is integral to the nature of docent expertise.

The final conclusion of this study is that context is integral to the nature of docent expertise, both in how expert docents learn and how expertise is developed. The context in which adults learn is central to the learning process (Caffarella & Merriam, 2000). This is also true for docents as they gain the knowledge and skills necessary for their work. I have determined that expert docent learning is influenced by context related specifically to the physical nature of a museum, and the emotional and social impact of the institution on the docent.

The contention that learning by expert docents is in direct relation to the multidimensional context of the museum setting is similar to Siegel’s (2001) promotion of contextual significance in professional learning. He identifies the importance of institutional components, as well as individual agency on learning in the workplace. The importance of context is also addressed in museum education literature. Falk and

Dierking's (1997) examination of visitor experience in museums stressed the critical importance of museum context on learning. Based on their findings, they outline an Interactive Experience Model, which explains visitor learning in museums in relation to personal, social, and physical contexts.

The Interactive Experience Model is defined by three contexts relevant to learning in museums: the personal, social, and physical. The lessons of the personal context include: (1) motivation and emotional cues initiate learning; (2) personal interest facilitates learning; (3) knowledge is constructed from prior knowledge and experience; and (4) learning is expressed in an appropriate context. Second, sociocultural context describes learning as both an individual and a group endeavour. The last part of the Interactive Experience Model is physical context, which emphasizes the notion that learning is dependent on a person's ability to place prior experiences within the context of their physical setting (Falk & Dierking, 2000). In *Learning From Museums*, Falk and Dierking (2000), point to the significance of the physical setting stating,

Learning appears to be not just "enveloped" within a physical context but rather "situated" within the physical context. All learning appears to be inextricably bound to the environment in which it occurs, generalizable to new situations only when elements of an old context are recognized in the new. (p. 65)

My study corroborates and adds to Castle's (2001) examination of learning by museum educators. She established that time, setting, and audience expectations and needs were critical to learning. Expanding on this list I found that docent learning is influenced by physical context in a number of ways. The size of an institution, in both its dimensions and the number of visitors it serves impacts what information a docent learns.

The amount of information related to objects, text panels, and multimedia may demand that a docent pace his or her learning or be selective on where to focus her or his attention. Physical context also influences the opportunities for practice and experimentation. If a docent serves in a small historic home in a rural area she or he may only facilitate a tour once a month, while a docent at a national site may give several tours in the course of a day. Additionally, how an organization facilitates learning opportunities, which are often a result of available space, resources, and staff, can shape docent learning.

The link between context and learning points out the role of situated learning in the development of museum docents. The three concepts important to situated cognition are: day-to-day learning and thinking are social activities; the availability of situationally provided tools which influence thinking and learning; and thinking is greatly structured in relation to a setting (Lave & Wenger, 1991). Fenwick (2001) also outlines situated learning in terms of social activities involving an interaction between learner and community, including history, values and rules. Tools are found on-hand and go beyond objects to include language and technology. Furthermore, Fenwick describes the setting or context as an activity at the moment of learning and includes the challenges and norms the context presents. These ideas relate to what Wilson (1993) identifies as a need to connect learning to context.

Moreover, I found that expert docents' learning is influenced by factors such as their dedication and commitment to the institution and its mission, a connectedness to the history or sense of place, and a bond generated from relationships established through

service to the organization. All of these are rooted in the emotional-social context and result in a greater commitment, dedication, and willingness to learn on the part of expert docents.

Learning communities also influence expertise development. My study found that one aspect of emotional-social context on docent learning was the social interaction among the volunteers. Social groups supported each other personally and in their learning as docents. Tsui (2003) notes that at the expert level task completion often demands individuals pool together their expertise. Daley (2002) refers to the culture of an organization and how it can frame a professional's learning. This is further developed by Benner et al. (1996) who note that knowledge is produced communally in a dialog of divergent views and ideas. Organizational behavior literature also considers a sociocultural context and addresses the concept of occupational community (Barley & Van Maanen, 1984). This phenomenon is defined as:

A group of people who consider themselves to be engaged in the same sort of work; who identify (more or less positively) with their work; who share a set of values, norms, and perspectives that apply to, but extend beyond, work related matters; and whose social relationships meld the realms of work and leisure. (p. 295)

Participants in this study described examples of these types of communities. One example of an occupational community came from my interview with Suzanna.

Throughout our discussion Suzanna touted the great people at Boston By Foot and shared how she has built lasting relationships that are fostered in her role as docent and in her personal life. When an injury prevented her from giving tours, her fellow docents were

there for her, “They have been supportive people in my life. They have been the ones running errands for me and stuff and it’s not like I have been out of touch with them and I think that makes a difference.”

Similar to occupational community is the learning organization. These are places where individuals increase their ability to create the results they desire and where new and unrestrained thinking is supported. Additionally, the learning organization is where aspirations are allowed to flourish, and people are continuously learning to learn (Senge, 1990). At Boston By Foot experienced guides are encouraged to take on leaderships roles. For example, Madeline presents continuing education, serves as a training facilitator, and takes on the responsibility of conceiving and designing Tours of the Month and then preparing others.

The literature on the subject of expertise development is often isolated from contextual factors (Kuchinke, 1997). In other words, studies examining the nature of expertise ignore contextual factors in relation to expertise. My study found that context is critical to how docents develop expertise and cannot be ignored. In previous studies of experts, context has been labeled the current situation or problem faced by an expert (Dreyfus & Dreyfus, 1986), the day-to-day practices of experts (Benner, 1984), or the constraints of a task (Shanteau, 1992). I found that context was a complex blend of the previously identified situations, problems, and practice, as well as the institution itself both in its physical form and what it represents, and the commitment and competencies necessary to serve as a docent for each program or tour. This multidimensional context is integral to expertise development.

The nature of the museum or cultural institution, including the organization's mission, public programs, and design, influence the forms of delivery used by docents. Coupled with this is the content knowledge necessary for a docent to perform in her or his role as interpreter, guide, or facilitator. Due to the organic nature of museums, in a multidimensional context of ever changing exhibits, thousands of visitors, and continuous updates to content and historical information, it is critical for the expert docent to be able to adjust to change, adapt to visitors, and when necessary, stray from convention, all the while maintaining an expected level of knowledge and skill.

Herling and Provo (2000) maintain that an expert is an individual who combines the domains of knowledge, experience, and problem solving within the domain of expertise. Furthermore, they contend that expertise is domain specific, supporting my finding that expertise is contextually based. I contend that an expert docent cannot function as an expert in every museum environment. An expert interpreter in a historic home is not an expert in an art museum. An expert guide who conducts walking tours of New York City cannot walk into the Guggenheim and expect to start at the same expert level. It can also be said that the same guide cannot arrive in Chicago and start giving walking tours of that city at the same expert level as she had in New York. What Prenau, Adler, and Gunders (1992) describe as heuristics, or the rules of thumb used by experts cannot be relied upon by docents for achieving or maintaining expertise. While a docent may retain some heuristics, such as the ability to read an audience, a docent must adapt to the new demands of the context. As context changes it influences learning, as well as an individual's level of knowledge and skill. This agrees with Herling (2000) who states that expertise is dynamic and as such involves internal processes of continuous learning

typify by constant knowledge acquisition, reordering of information, and progressive problem solving.

My findings indicate that when the information or task changes from what an expert does has been accustomed to they maintain a level of expertise but start over in the initial phase of development, with the base knowledge and the added ability of moving to a new form of expertise more quickly. I contend that this same idea holds true for individuals in other professions or areas of expertise. For example, in a study of expert nurse practitioners (Daley, 1998) a nurse identified as an expert, had expertise in gerontology. When the context dictated an understanding of gynecology she was dependent on OB-GYN nurse practitioners in her clinic to gain the necessary knowledge and skills to meet the contextual demands of her situation.

Other examples can be found in literature related to master teachers and their classroom expertise. In a study of novice, advanced beginner, and expert teachers, teachers identified as expert express concern over their ability to perform well in a laboratory setting versus their own classrooms (Berliner et al., 1988). When the context they were familiar with, specifically the classroom dynamics, relationships with students, understanding of students abilities and a routine were altered by the researchers, the expert teachers' performance suffered (Berliner, 1992). Berliner (1992) noted that the study, "had taken away the particular context in which these pedagogues had learned to excel" (p. 45).

Still more examples can be found in case studies of expert teachers. In Tsui's (2003) study of expert and novice ESL teachers, she provides yet another illustration of how a change in context impacts expertise. One teacher was considered to have expertise

in ESL instruction, but that expertise did not transfer to other areas of her work. Tsui (2003) states, “She took on the role of a panel chair, she had no idea how to lead and manage a subject panel. She also had no idea how to provide leadership in curriculum development. She had to gain competence in performing that role” (p. 279).

All of these cases demonstrate my contention that context is integral to the nature of expertise. As Tsui (2003) suggests, because some professions and practices are complex or too vague in definition, it may be necessary to speak of expertise in areas of specialization or as I contend in relation to specific contexts. For expert docents those specific contexts relate to the physical nature of a museum and the emotional and social impact of the institution on the docent.

Like Bereiter and Scardamalia (1993) who propose that expertise is a process and not a state, the model proposed in Conclusion Two accounts for both forward and backward movement by all docents, illustrating the fluid nature of expertise. This fluidity is central to the process and demonstrates the influence of context and dynamic nature of docent expertise. Any docent, novices and experts alike move between phases and are found in Dependence if the context or situation dictates. Docents cannot just adapt to a change in context using intuition as is suggested by Dreyfus and Dreyfus (1979; 1986). Nor can they simply rely upon “enormous background experience” (Benner, 1984) to address a new context; instead docents must re-develop.

Within museums and in the nature of docent work, context changes can be dramatic. With demands for new content knowledge and new tour or programming formats and structures docents must be subject matter experts and expert facilitators. This means skills and subject matter knowledge are equally important. My findings are that

docent expertise requires both “know how” and “know that” because museums expect it. The expert docent cannot simply rely on experience and skills to guide him or her through the new context. This finding more closely resembles Daley’s (1998) study of professional development. She contends that individuals with experience must go through a complicated process of constructing a knowledge base in practice.

Support is also found in the concept of situated knowledge (Lave & Wenger, 1991) which describes knowledge as contextual and created by individuals in response to a specific context in which they are practicing. Lave (1991) contends that cognition is not stable or constant since contexts can have multiple variables. When applied to docents, this means that even with all of the characteristics of an expert docent, an individual can still be found in any of the phases of my model depending on context.

Such findings contradict the concept of conscious deliberation (Dreyfus & Dreyfus, 1986, 1996). Dreyfus and Dreyfus contend that decision-making by experts is something that rarely happens, except in cases where there is deviation from the normal pattern. This occurs when tasks are quick and repetitive. However, as I noted previously, expert skill acquisition assumes consistent context, but in the studies by Daley (1998; 2002), Lave (1996), as well as my own, context influences expertise. The fluid nature of docent work and the institutional context often lack routine and can even be problematic.

This idea is illustrated through a tour I attended as part of this study. David, a guide with Boston By Foot, had been identified as an expert by the key informant at the organization, as well as by the other participants from that site. Based on the findings I determined that he was indeed a docent who possessed the characteristics of an expert, yet when I observed his tour I was troubled by his dependence at times on note cards.

The tour was a Tour of the Month. This special tour is not a regular part of offerings through Boston By Foot and as a result the context was different than what David was accustomed to in his role as guide. Using the model, I determined that David was, in the case of this tour, an expert docent in a Growing Independence phase. He was not completely scripted and did interject his knowledge of the area we were visiting, particularly in relation to modern structures, but he was dependent on his notes related to the Great Boston Fire, which was the theme of that particular tour.

The example and the conclusion that David was significantly impacted by the change of context are supported in the literature. Glaser and Chi (1988b) state that in a domain of knowledge which an expert does not specialize they behave as novices. Camerer and Johnson (1991) found that when cognitive abilities are poorly matched to environmental demands experts fail. In complex environments with dynamically changing context it can be difficult to make predictions and decisions, and may account in some part for inferior performance and decision making on the part of experts. Moreover, even Dreyfus and Dreyfus (1996) admit that, “a person can simultaneously be an expert with respect to certain types of situations while being less skilled with respect to others. Hence, expertise...does not necessarily apply to a whole skill domain” (p. 36).

I argued that a docent who experiences a change in context prior to reaching Transcendence may be forced into a cycle of mediocrity and lack the momentum to move through the phases in later attempts. Similarly, Ericsson and Smith (1991) contend that differences should be made between a person involved in practice and those who are merely exposed to an event. They found that learning could be slowed or nonexistent if feedback is delayed or omitted.

Additionally, when all aspects of docent expertise are present there is an indication that momentum too plays a role in a docent's ability to move through phases quickly. The amount of experience and competencies retained after a docent experiences a shift in context, as well as opportunities for practice aids re-development and expedites him or her through the phases. This acceleration is supported by Glaser and Chi (1988a) who found that experts are fast and faster than novices at performing the skills of their domain. This is also confirmed by the third generation theories of expertise (Holyoak, 1991). This emerging paradigm is based on a principle of small units of knowledge that are linked and accessible through an integrated network. The result is expert knowledge that is more rapidly constructed appropriate to the specific problem (Holyoak, 1991).

The findings of my study demonstrate the interconnectedness among the characteristics of expert docents, the role of context in the nature of docent expertise and the model. An expert docent must first possess both the preexisting and acquired characteristics, while also serving in a context where they can excel and where their learning is supported. If these first two concepts are in place then there is a strong likelihood that a docent can move into a Transcendence phase. The model and study findings support the idea that museum educators must put processes in place to sustain docent expertise and support the completion of the cycle. When context changes a combination of informal learning on the part of the docent, formal training and development provided by the institution, and practice can quickly move expert docents through Dependence and Growing Independence and back to Transcendence.

This section examined three conclusions. First, expert docents have a unique combination of acquired and preexisting characteristics. Second the development of

docent expertise is not a set of finite steps; instead it is a cyclical, fluid process. Finally, is the conclusion that context is integral to the nature of expertise.

Implications for Practice

Museums, similar cultural institutions, and other organizations that rely heavily on volunteers should cultivate a means of developing volunteer expertise that could be added to existing training and programming. Paid staff can connect learning processes, such as those defined in each phase of the development model to the work of volunteers, thus creating situations that foster and inspire the volunteer, sustain the volunteer-organization relationship, and encourage personal growth.

For example, a docent at a Dependent phase would benefit from a structured mentoring program. The docent in this phase can be paired with an expert docent who can model delivery, demonstrate strategies, and offer resources and materials to support the learning process. Additionally, museums with space and resources can establish a loaning library for docents seeking new content knowledge. Museum staff working with docents at the Growing Independent phase should implement forms of critical reflection. Journals, Intranets, self-evaluation forms, meetings among peer-docents, and opportunities to discuss their tours with staff and mentors creates an environment which encourages experimentation and fosters exploration, leading to Transcendence. At Transcendence, docents can contribute to the museum as well as benefit from facilitating training for docents and staff, designing original tours and programs, and serving as mentors. Such experiences support self-directed learning and continued personal growth and commitment to the museum, while at the same time serving the needs of other docents. Utilizing docents in this phase also serves to encourage expert docents to move beyond their comfort zones, taking them beyond a context they have mastered. When

docents learn through designing, teaching and working with their peers, they often enter a new context, willingly taking on content, formats, or audiences in the process of developing new tours and programs, thus moving them back to Dependence but with greater confidence and understanding of their work. For example, at Boston By Foot Madeline could have just continued giving tours she had mastered, but instead, she took on the responsibility of designing and training her peers for a tour of literary landmarks and Boston authors. By doing so, she voluntarily moved out of Transcendence and back to Dependence as she gained new knowledge, developed new content, and worked to create a format and presentation that would work for herself, other docents, and visitors.

In general, this study points out that experts in museums and similar organizations need to be provided with opportunities for growth and renewal, as well as chances to share their knowledge and experience with others. Through formal continuing education, docents can hone their skills, have a sense of purpose, and feel inspired to continue or expand their own interests.

With an understanding of docent characteristics, museum staff can develop docent recruitment programs that seek out individuals with the preexisting characteristics of enthusiasm, commitment, adaptability, and sense of humor and create approaches that support the development of the acquired characteristics of knowing the subject, communicating information, and integrating prior experiences. Staff responsible for designing docent training and preparation will also be able to consider informal and incidental learning in addition to traditional formal methods as they plan programming and curriculum that maximizes opportunities for learning, success, and attainment of expertise. This manner of learning values the knowledge of “non-experts” and places importance on the experiences of individuals. It also encourages participation in the planning, implementation, and assessment of learning activities

(Hansman, 2001). For museums this means that they must not only see curators as sources of knowledge and expertise, but docents as well.

Falk and Dierking (2000) acknowledge that museum staff, including docents have a positive influence on the experiences of visitors, especially if these individuals are well trained. Based on my conclusion that beyond training, expert docents must also possess preexisting characteristics, docents with such characteristics must be sought out by museum staff if a positive influence on visitor experience is to be achieved. The finding that expert docents possess both acquired and preexisting characteristics presents a challenge for those responsible for museum docent recruitment and preparation. Docents in my study were volunteers and presumably, a non-profit institution such as those in this study would not want to turn away volunteers. This is evident in docent programs that do not require formal evaluations of docent tours. The fear that a poor evaluation means that a docent may have to be re-trained or worse reassigned or asked to leave is a real consideration. Those responsible for docent recruitment must determine if an individual is a good candidate to be a docent by assessing his or her preexisting characteristics and determine how staff can assist the individual in developing acquired characteristics of docent expertise.

The model that emerged from this study is also a valuable tool for those responsible for training, development, and continuing education in a variety of fields where experts move from one realm of a profession or practice and into another, including the medical field, law enforcement, and education. It has implications for human resources and organizational development professionals and those responsible for hiring. The model indicates that even seasoned professionals and experts need time to reach a Transcendence phase within an

organization and HROD professionals need to take that into consideration when evaluating and assessing the work of employees.

Recommendations for Future Research

Based on the findings of this study and the model developed as a result of these findings, a number of recommendations for further study have been generated:

- 1) Carry out a study of novice and expert docents working in preparation for a new exhibit to examine the process outlined in the model. By doing so, a researcher might be able to ascertain the exact influences impeding or accelerating an individual's movement from Dependence to Transcendence.
- 2) This study focused on four different history-themed institutions. An alternative study can involve docents within a single museum or cultural institution, or museums with content other than history, thereby placing the organizational context at the center of the examination of expert docent characteristics and development, thus testing the context finding in this study.
- 3) Participants in this study indicated some connection to the institution in which they served. Most point toward obvious links such as family history, religious and geographical affiliations, and past careers. Interviews with expert docents who have less obvious links to an institution, such as Christian docents in Jewish history museums, non-U.S. citizens serving as docents at American history sites and visually impaired interpreters at art museums may lead to a better understanding of the characteristics of commitment and enthusiasm and integration of prior experiences found in this study.
- 4) Conduct a similar study with participants working in fields such as medicine, law enforcement, or education to determine if the cyclical model has implications in other areas of practice.

5) Design a quantitative study using an open-ended questionnaire to reach more participants.

Some docents who were unwilling or unable to commit to an hour-long interview may choose to share their experiences through a survey instrument. A larger sample might reveal even more expert docent characteristics and docent learning processes than those determined through the study of the 12 participating docents.

With this study serving as a foundation for further research investigating the nature of expertise, it is important for researchers to continue to expand on these findings and conclusions and critically examine the Cyclical Model of Expertise presented in this study. Doing so will not only benefit museums and docents, but those in a variety of professions and disciplines.

Chapter Summary

Based on interviews with 12 docents at four museums with history themes, three conclusions regarding expertise and its development within the context of the museum emerged. First, expert docents possess a unique combination of acquired and preexisting characteristics. Second, the development of docent expertise is not a set of finite steps; instead it is a cyclical, fluid process. Last, context is integral to the nature of expertise. This chapter also addressed the implications for museums and those responsible for training docents, adult educators, HROD professionals, and providers of continuing education to both professionals and volunteers, and for docents and guides in general. Finally, recommendations were made for possible future studies.

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APPENDIX A

Interview Guide

Background

1. How did you come to serve as a volunteer docent at (Institution)?
2. How long have you been a docent at (Institution)?
3. What was included in your “official” training as a docent?

Expert Docents

4. Describe for me what you believe makes a good docent?
 - a. What characteristics must they possess? Knowledge? Skills?
 - b. How does a person become “good” at being a docent?
 - i. Prior experiences?
 - ii. Role models?
 - iii. Specific training or direction?

Developing Expertise

5. Share with me how you went about developing your expertise as a docent. Ask for examples:
 - a. In terms of facilitating visitor learning?
 - b. In terms of gaining knowledge?
 - c. In terms of delivery/interpretation?
 - d. How do you continue to add to your existing knowledge and skills as a docent?
 - e. Reflection?
6. Describe your experiences as a docent at (Institution).
 - a. Mentor?

- b. How does the context of the institution impact your individual development?
- 7. If a new docent came to you wanting to develop their own expertise, what direction would you give them?
- 8. Is there a question I should have asked?

Closing

- 9. What is your gender, age, and ethnicity?
- 10. What is your level of formal education?
- 11. Do you work some place other than this museum? Paid or volunteer?

APPENDIX B

Interview Confirmation Letter

(Name)
(Address)
(City, State, Zip)

RE: Confirmation of Your Willingness to Participate in My Doctoral Research Study

Dear (Name):

I am writing to confirm our telephone conversation and to express my sincere appreciation for your willingness to participate in my research study.

As I indicated, you have been identified by (Staff Member) at (Institution Name) as being an expert docent. The purpose of my study is to describe the process through which volunteer docents, in museums and similar cultural institutions, develop expertise. In order to gain data for my study, I will be interviewing you using a semi-structured interview. This means I will have questions to guide our discussion, but additional questions related to your responses can be added. The interviews will be audio taped and then transcribed for analysis.

Based on our conversation, we have agreed to an interview on (date) at (time) at (location and address). The interview will last approximately 1-2 hours. I will contact you again approximately a week prior to this date to confirm our meeting. If for any reason you need to reschedule or cancel please contact me as soon as possible.

Once again, thank you for your willingness to assist in this research. Should you have any questions, contact me at home at (phone number), by cell phone at (phone number), or by e-mail at (e-mail address).

Sincerely,

Robin Grenier

APPENDIX C

Interview Participant Consent Form

I agree to take part in a research study titled “Mastering Their Craft: How Museum Docents Gain Expertise,” which is being conducted by Robin S. Grenier, Adult Education Department, the University of Georgia, 706-338-0504 under the direction of Dr. Sharan Merriam, Department of Adult Education, the University of Georgia, 706-542-4018. My participation is voluntary; I can stop taking part at any time without giving any reason, and without penalty. I can ask to have information related to me returned to me, removed from the research records, or destroyed.

I understand that the purpose of this study is to describe the process through which volunteer docents, working in museums and similar cultural institutions develop expertise. The benefits I can expect from participating include the opportunity to reflect on my service and development as a docent and to provide information, which may assist others in the training and development of docents.

By volunteering to take part in this study, I agree to the following:

- Take part in a semi-structured interview conducted by Robin Grenier, lasting approximately 2 hours. This interview will be audio recorded and then transcribed for analysis. The researcher will retain these tapes indefinitely, in a secure location, for research purposes. Additional follow-up may be necessary to gain clarification or additional insight, and this will be conducted either in person or by telephone. Expected duration of any follow-up is not expected to exceed 30 minutes.
- I may be asked to provide documents related to my training as a docent, including training notebooks, guides, and notes. These materials will be photocopied and returned to me no later than one week after the research receives them. All names in the documents will be replaced with pseudonyms. The researcher will retain the photocopies of these documents indefinitely, in a secure location, for research purposes.

