Collections Knowledge Harvesting and Succession Planning

South Lanarkshire Leisure and Culture

Commencing in 2009, South Lanarkshire Leisure and Culture Trust has been running a three year, phased succession planning and knowledge harvesting project. Central to this project is the capture of extensive collections knowledge held by long-serving colleague Terry Mackenzie (who has been with the service since 1974), and the recording of this information in the museum service’s CMS. Crucially, and at this stage quite uniquely, this work is being carried out prior to Terry’s retirement, resourced through in kind contributions from SLLC and through grant funding.

In a second component to the project, Terry is leading a team of employees to mine and purify the collections knowledge gold held on disparate paper sources to enrich the CMS records. Museum staff are developing their own collections knowledge and are learning skills from Terry in harvesting and recording collections information and working with the CMS. Terry has been administrator of the CMS for the last 14 years and is now training the Senior Museum Officer to take over this role.

A target to create and enhance around 10,000 CMS records with fuller information has been set and particular collection areas to focus on identified with the help of the Retrospective Documentation Plan.

**Phase 1 (the first and inner circle) small scale**

Focussing on Terry and the CT and the collections knowledge and knowledge management systems we use. Look at staff progression & involve HR team.

**Phase 2 (the second circle) medium scale**

Focus on museum employee development. Utilise one of the Cameronian funded digitisation projects to test outputs and outcomes. Further collaboration with MA Monument Fellowship scheme. Look at PDR internally and CPDs.

**Phase 3 (the third circle) larger scale**

Based on lessons from Phases 1 and 2, explore Strategic approach to staff progression and succession across SLLC.

The full project plan can be seen here: [link]

**Process**

One of the many sources is the set of museum reception desk diaries from 1967 to 1994. In the era before entry forms were in widespread use, the diaries also operated as day books. Each team member would work through their “own” diaries. The diaries were worked through day by day and from earliest to last extracting all the collections knowledge and adding it to existing CMS records. Where no existing records could be found we introduced a rigorous system of creating new records in the CMS from the diary record.
In order to achieve the first aim of the project – to record knowledge held by Terry, he and Museum Officer Sharon Paton have been systematically working through the stores, picking out objects that Terry recalls having some role in collecting or that someone has later told him a further story about. Together they have devised a series of key questions to help direct Terry in his recollections. Initially the information was captured by Sharon taking notes as Terry talked and these notes would then be typed into the CMS.

More recently, in order to speed the process up, the project invested in speech recognition software. Terry’s answers are recorded using a digital recorder and run through the software which converts it into CMS-ready text. The recordings themselves can be attached to the CMS records as audio files.

Terry has also coordinated the harvesting of information from the various and disparate paper records, setting up processes for dealing with each kind of record and transferring its information into the CMS and running a training programme for the staff involved in the work. This is existing part-time front of house staff working on temporary contracts for additional hours, funded through project grants. An additional internship role has also been created to contribute to the completion of this work. The work is carried out at existing work stations within the service, with the addition of some extra hardware such as scanners purchased specifically for the project.

The project has been committed to identifying gaps in existing systems of knowledge storing and sharing and to implementing new systems as required which would allow new staff to pick up and use these systems from the outset.

Essential in this process is the powerful and sophisticated CMS which the service uses. SLLC commissioned Vernon Systems, the CMS supplier to create customised data entry screens.

The CMS currently has 24 sets of data entry and browsing fields. Some of these have as many as 3 tabbed sets of screens each. As we planned to employ front of house colleagues for whom this was not familiar, we designed a single set of data entry screens with 6 tabs that serve most of our day to day data inputting needs.

In addition we identified the need for a generic CMS. Our CMS suppliers recommended MS Excel as the best platform for this. A major advantage of this approach is that data can be added on a laptop away from the main IT networks and exported to our CMS. Also, we see the potential in this for MGS to offer this as a tool to Scottish museums. In theory, data in could be exported to Multi Mimsy or the like.

Outcomes and Impact

The enhanced CMS records are proving invaluable for the museum team’s work in planning exhibitions, events and activities and responding to public enquiries. In particular, the permanent exhibition on the Cameronians at Low Parks Museum has been redeveloped and there are plans to develop the lifelong learning programme and the object and ‘soldier’ of the month programmes making use of these new records. Existing and potential new audiences for the collection will also benefit directly from
these enhanced records being made available through an online browser to be launched at the end of September 2011

The project has contributed considerably to development of the existing workforce with staff having been trained and learnt skills in object handling and care, collections information gathering and use of the CMS. They are the first point of contact with the museum’s visitors and they can make immediate use of the collections knowledge that they are gaining to enhance the service they offer visitors. Succession planning is now embedded in the way museum staff work and the processes that are in place. The project has also made it possible to further identify the service’s needs and write clearer job descriptions as a result.

In October 2010 the Senior Museum Officer, Gareth Hunt, delivered a presentation on the project to the ICOM meeting in Poland

Terry is currently working with MGS’s standards manager, Gillian Simison to produce a case study on our project for the MLA website

What has been learned?

The project did encounter technical problems with the speech recognition software. The programme struggled to translate recordings made in store conditions and it has proved necessary for Terry to listen back to the recordings made in the stores at his desk, repeating them live into the microphone and this produces a far more accurate translation. Working in this way still saves time on typing up notes. Latterly it has been recognised that one full day a week needs to be set aside to focus on gathering Terry’s own collections knowledge. It was necessary to suspend the other knowledge harvesting work for a time in order to catch up on this part of the project.

The project has developed in unplanned ways as it has gone along and further opportunities have presented themselves. For example, with the encouragement of the MA’s Lucy Shaw, Terry has taken on a mentoring role with two of the current Monument Fellows in Scotland (Western isles Council and North Lanarkshire Council). It has become clear that the lessons learned are relevant well beyond the museum service alone and Terry is currently working with SLLC on ways in which succession planning could be incorporated into other areas of the Company’s business.

Following a meeting and subsequent exchange of information between Terry and SLLC’s training manager the Trust has adopted a succession planning project policy and are in discussions with heads of service to identify ways of including this in PDRs across the Company’s business

What next?

The areas being explored for Phase 3 of the project are:
- Working with the Health and Fitness team’s leader on a pilot project to explore succession planning within the team before a potential roll-out to his 33 managers

- Working with the HR team’s Training and Development Officer to explore the centralised recording of the training that the succession planning project team members have received through the project.

- Working with the team leader at the Key youth centre in East Kilbride towards achieving listed building status for the Key. Working with the young people of the East Kilbride and Strathaven Youth Forum, we are using this as a plot project to help deliver succession planning in South Lanarkshire Council’s youth Services.

- Exploring with Libraries the proposal for HLF funding to digitise our Chatelherault archives and the Library holdings of important Duke of Hamilton estate papers. The plan is to use PT librarians on extra hours to carry out the digitisation with similar employee and service succession planning outcomes to the existing Museum project.

- Exploring with Glasgow University to offer a placement in museum digitisation work to a post-graduate student. We see this as a pilot for regular student placement opportunities.

**Key partners:** Trustees The Cameronians (Scottish Rifles)

**Funding:** The project is generously funded by Museums and Galleries Scotland and the Trustees of The Cameronians (Scottish Rifles). So far I have secured external funding for succession planning to a total of £43,263.

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