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# The Role of Learning Experiences in the Development of Expertise

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**Abstract:** This study examined the types of learning experiences leading to the development of expertise. A qualitative research approach was employed with twelve participants from a purposeful sampling of four historically themed museums. Analysis revealed learning experiences leading to expertise development included formal training and continuing education and informal and incidental learning.

## Introduction

Museums have long held a place within the field of adult education as a context for providing educational opportunities to visitors. Moreover they provide learning to volunteers that serve in a variety of roles, including docent. These docents, who are often volunteers, require a grasp of their subject matter, as well as an understanding of communication and facilitation skills for an array of audiences. 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, has a positive influence on the experiences of visitors, especially if these individuals are well trained.

The opportunity for docents to serve in museums provides the chance for personal education, growth, and challenge (McCoy, 1989). These individuals are themselves adult learners, while often serving as adult educators to museum visitors. A majority of docents in the U.S. are volunteers and training is adequate at best, yet some become what others would call expert docents. These master docents provide an opportunity to examine how they learn their craft and develop expertise. The purpose of this study was to contribute to the research surrounding the study of expertise by examining the development of expertise and the multidimensional forces at work in the process. The research question addressed in this paper is how these individuals developed their expertise and knowledge as it relates to their role as docent. The findings give particular attention to learning experiences that lead to expertise development.

A qualitative research approach was employed. In-depth interviews were conducted with twelve participants. 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 had at least three years of museum experience in leading tours or programs. The primary data source was in-depth interviews with open-ended questions and supporting data from observation, and documents to provide a contextual frame. An analysis of the findings revealed 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.

## Findings

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.

### *Formal Training and Continuing Education*

The docents each described training and continuing education as a form of learning in the development of their expertise. Although the docents from the Atlanta History Center each described their training somewhat differently, primarily because they volunteer in different venues, April's description was typical. "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."

Melissa and Cindy described the training at the Abigail Adams Historical Society as less structured, but told of 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 stated that docents are given a manual and that job aids were available to docents during a tour or for preparation for tours.

In contrast to the Abigail Adams House, the formal training at Boston By Foot is extremely rigorous. Each of the docents interviewed described 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. Additionally, there is a formal evaluation and a final slide identification exam. Once you have completed the course, returning docents are provided with opportunities to participate in formal continuing education. Held six times during the tour season the programming is designed and facilitated by experienced docents. With so many opportunities for formal training 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 explained 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 stated 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.”

### *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.* The docents expressed the importance of learning from others at their museums. Through observation, shadowing, and modeling the participants were able to development 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 Ashley was asked 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....”

April found 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.

Docents also describe the use of technology in their learning from others. 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.”

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 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. 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 key. “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.”

Participants in the study also identified television and films, and to a lesser extent the Internet as sources for gaining new knowledge. 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.”

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.”

### **Conclusions and Implications**

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. 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. As a result, docents must utilize a vast array of learning to keep up with the needs of museums and the audiences they serve. This finding 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 (1996) contends that cognition is not stable or constant since contexts can have multiple variables.

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. 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.

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