AASLH
TECHNICAL LEAFLET BUNDLE
A PUBLICATION OF THE AMERICAN ASSOCIATION FOR STATE AND LOCAL HISTORY

Reaching Out to Your Audience

BNDL013

Increasing attendance is at the forefront of efforts for many local history organizations. This bundle includes practical advice for reaching out to visitors and potential visitors to help insure that they are aware of what you can offer them and that those offerings are appealing. The suggestions in these technical leaflets are things you can do in addition to having great exhibitions and programs.

TL124 – Working Effectively with the Press (1980)
TL125 – Training Docents: How to Talk to Visitors (1980)
TL146 – Planning and Conducting Successful Seminars and Workshops (1983)
TL172 – Site Analysis for Tourism Potential (1990)
TL200 – Tips for Better Newsletters (1998)

Technical
LEAFLET

Working Effectively with the Press:
A Guide for Historical Societies

G. Donald Adams
Greenfield Village and Henry Ford Museum

Introduction

All historical organizations are capable of effective promotion in the printed media. Although very desirable, a full-time specialist is not required to achieve a basic program of effective promotion. Likewise, a basic promotional program can be maintained on a very limited budget.

Rising operating costs, competition for attendance and gift income, and grant criteria that demand demonstrated involvement with and service to the public leave most historical organizations no choice but to tell their story convincingly to the public.

The programs that visitors to your organization enjoy are the same activities that make good stories for the media. Do everything you can to make your organization worthwhile, educational, and fun, and then tell the media what you have done to achieve those ends.

Far from inappropriate, promotion is fundamental to the growth, conservation, and interpretation of historical organizations and

their collections. In addition to nourishing the fiscal well-being of the organization, promotional programs offer unlimited opportunities for interpreting collections, through the commercial printed media, to broad new audiences. Through involvement with the media, the curator can extend the interpretation of the institution's collections far beyond the walls of the organization and probably can expect new gift accessions and increased interest to result from published stories.

Getting Started

To start your promotional program, have a brainstorming session with your associates in the organization and list every story idea that emerges. Story suggestions are made later in this leaflet, but because each organization differs in its purpose and collections, you will have to learn to view everything that you have from the perspective of "will it make a story that would be interesting to the media and the public?"

Perhaps you will want to organize a publicity committee composed of interested local people if your organization's staff is limited to only one or two professionals.

You may want to attend workshops for beginning writers such as those sponsored annually by the New York Publicity Club. See the appendix of this leaflet for where to write for information on its courses.

If you personally do not have the time to write stories, consider one or more of these alternatives.

1. Print 8 x 10 stock with the name of your organization and "Possible Feature," then send an outline of the idea—the who, what, where, why, and how—to selected media you think might be interested. Be sure to include your telephone number.
2. Telephone the story idea to an appropriate reporter, perhaps offering it on an exclusive basis to that one publication.
3. Invite reporters to visit your organization so you can talk about the story idea with the hope that they will write about it. You may visit them at their offices but call ahead, make the visit short, and don't pester them with repeated visits. The most effective way to interest writers in a story is to have them make a personal visit to your organization.

   Beyond having story material for writers, you will want to be a good host for them when they visit your organization. It is common to allow free admission to all media persons who show their credentials at the entrance. Be sure your media admission policy is well stated and understood by everyone in your organization.
4. Consult area colleges and universities to see if public relations or journalism students could be assigned specific story ideas about your organization for release to the media. It would be best to have them turn the finished stories in to you so you can take the release to the media. Perhaps students could serve a professional internship for a semester in your office. Students also may provide some necessary photography. High schools and junior colleges might be consulted if you are not near colleges.
5. Among the friends of most historical organizations are persons trained and experienced in journalism, sometimes including retired newspaper writers, who might volunteer their services. Given direction by you, they might write stories, enlist the support of their friends in the

media, and help host visiting writers.

Changing exhibits, new accessions, special events, educational programs, lectures, and other activities the public will be interested in learning about and becoming involved with will all help to bring your organization to the attention of the media. If you have very little activity at your organization, examine your collections to see how they relate to current issues in the news. For example, you may have a bed warmer that would make an interesting short feature to offer newspapers during cold fuel-short months. Most likely, your organization is working with local schools, children are sending you thank-you letters, and you have unpublished material of local interest in your library; all of these are story subjects that can be offered to the media.

Once you have succeeded in placing stories, it is important that you keep a clippings book and that you observe attendance upturns, increases in gift income, and other changes you feel may be attributable to the increased publicity. This data can be an important justification for increased staff and for securing an adequate promotion budget.

Above all, do not be afraid of your publicity responsibility. There are too many historical organizations whose programs have been greatly diminished because there was no one on the staff who thought he or she could write a story to send to a newspaper or magazine.

You can do it, and as a person who shares the responsibility for the financial well-being of your organization and the effective interpretation of your collections, you must!

The Basics

Every story must accomplish three things:

1. meet the editor's criteria or it won't be published;
2. interest the reader or it won't be read;
3. be absolutely accurate or the organization's credibility with the media and the public will suffer.

First Objective: Meet the Editor's Criteria

Every day newspaper and magazine editors receive many times the amount of material they can use. As "gatekeepers" of what goes on their pages, they know what interests their readers. Editors select only a few of the mass of releases they receive each day.

The following guidelines will help assure that your story will at least be considered by the editor.

■ Use the correct release format.

1. Imprint your 8x10 release paper with a

simple masthead at the top. Prominent in the head should be the name and address of your institution, the name of a contact person who is qualified to give further information, and the telephone number where the contact person may be reached. You may wish to list an evening home number as well as the office number. Design the masthead to take a minimal amount of space on the sheet and keep it the same indefinitely so editors can spot immediately that the release is from you. Use of a mass of color in the masthead design can further help distinguish your release.

2. Unless there are extenuating circumstances, such as an announcement of a gift that must be timed with a donor's wishes, type FOR IMMEDIATE RELEASE at the top left of the release and underline it. If it is absolutely necessary to control the date and time that a story is published, you may substitute FOR RELEASE P.M. TUESDAY, MAY 9. Also, you may wish to release a story EXCLUSIVE IN YOUR CITY or SPECIAL TO THE DETROIT NEWS, which means it is being issued to the *News* in advance.

3. You may wish to type a suggested headline at the top right of the release. Keep it short, interesting, and descriptive and type

it in all capitals. For example, EDISON'S INVENTION OF THE PHONOGRAPH TO BE RE-CREATED AT HENRY FORD MUSEUM.

4. Leave about six blank spaces so the editor can write in a headline, then type flush left the dateline (where the release is being mailed from) followed by two hyphens. Begin the story on the same line. Use a five space paragraph indentation. Double space the release, but it is permissable to single space the last few paragraphs if it will permit you to finish the story on that page. Keeping your story tightly written and to a minimum number of pages will make it more attractive to editors.

5. If the release is more than one page, type —MORE— centered at the bottom of each page and at the top left of the following page type PAGE _____ OF _____ PAGE STORY. HENRY FORD MUSEUM.

6. Type -30-, the editor's symbol for the end, at the end of the story.

7. If there is a significant media misconception about your institution that can be corrected by repeating on every release a short statement of clarification, type that statement in all capitals at the bottom of the last sheet below -30- The use of a clarification statement on every release is based on the concept that if you say the same thing often enough it will be remembered. For example, Henry Ford Museum often is wrongly thought of as being part of Ford Motor Company. Thus, the statement GREENFIELD VILLAGE AND HENRY FORD MUSEUM ARE INCORPORATED AS THE EDISON INSTITUTE, A NON-PROFIT EDUCATIONAL INSTITUTION is typed at the end of most releases from that organization.

8. The last entry on the release, typed in the bottom left corner, should be your code to aid you in recalling at a future date who received the release, when it was mailed, who wrote it, and any other useful information. A simple code entry would be: 110778 GH PRM E2 (274). From this we know the release was written November 7, 1978, by our writer whose initials are GH. It was sent to our distribution lists that are coded PRM and E2. A total of 274 releases was mailed.

9. Do not ask to see the story after it has left your hands and before it is published. Likewise, when a story is based on an interview, do not ask to check it before it is published. Nearly all writers will check

SAMPLE FORM

This sample release paper illustrates a simple, distinctive masthead. See page twelve for a sample press release.

with you before publication if they have a question or the subject is complex. Indeed, you will find that most writers are as concerned with accuracy as you are. It is important to understand that once they receive a story, the media treat it as their property and will make decisions on how to publish it, perhaps combining it with similar stories or combining one or more of your releases.

■ Editor's criteria vary.

Editor's criteria vary with local, weekly, and daily newspapers, large area dailies, and magazines.

1. The weeklies and small dailies in your institution's home community are likely to be interested in all of your releases but are apt to be the only publications interested in names of local people and stories solely related to the local community. Programs with the local schools, member recognition and fund-raising affairs, and volunteer awards usually are among subjects of interest only to local newspapers. Don't overlook the weeklies and small dailies in the hometowns of your employees, guest lecturers, exhibitors, and others. These hometown stories that emphasize the names of local people probably are the most frequently published and widely read stories that you will release.

   If you do not want to put the local weekly that may publish on Thursday at a disadvantage by having the same story break in the large area dailies before the weekly can use it, you may wish to delay releasing to the daily until late Wednesday. Thus, you will be certain that the story will not appear in the daily prior to its Thursday edition. Get acquainted with the deadlines of the newspapers with which you deal. Deadlines for weeklies and for Sunday editions of dailies vary considerably.

2. Large area dailies usually are located in the nearest large cities. They are read by people in your home community and in a broad geographical area surrounding your institution. Their editors are likely to be interested only in those local people who are prominent throughout their reader area. The exception is the large area daily with a regional edition published for the town where your organization is located, in which case the regional editor may be interested in local persons. Large area dailies usually have staffs of several writers, some of whom are specialized. Make it a

habit to read the area dailies to become familiar with their editors. Then get personally acquainted with such editors as calendar, travel, antiques, art, and regional, preferably by inviting them for an individual visit or a simple press luncheon where you can get better acquainted in a friendly social setting. If the city where your large area daily is published has a press club, you will find that by joining it you will have opportunities to meet important editors.

Send stories on all public special events to the large area dailies three weeks in advance of the event. Never send the same photograph to two or more newspapers in the same reader area. Consult the photo section of this technical leaflet for more information.

Don't overlook reaching large numbers of newspapers by occasionally sending the most interesting of your feature shorts and photos to the nearest bureau of the Associated Press or United Press International or to syndicates whose addresses you can find in a syndicate directory listed in the appendix of this leaflet.

3. Magazines focusing on history, collecting, and travel and Sunday feature magazines published by newspapers are most likely to be interested in historical organizations. First read a few issues of the magazine to become familiar with its approach and style—adventure, scholarly, photo feature. A magazine story usually is prepared specifically for and distributed to only one magazine. The exceptions when you would mail copies of the same story to several magazines would include calendar listings of forthcoming events, informational or news stories of equal interest to a group of magazines such as new accessions for antiques magazines or new group programs and special events for travel magazines.

   The major difference in releasing stories to magazines versus newspapers is that magazines need to receive stories further in advance of the desired publication date—usually eight weeks or more if color photos are not involved, three months or more if there are color photos.

   Magazine feature-story queries usually are sent first to the largest circulation magazine that would be interested in the subject on an exclusive basis; the query would be sent to the next magazine only if the first choice has rejected the idea. Different angles on the same story subject

may be developed and sent as queries on a non-exclusive basis to non-competing magazines, but this approach should be used with caution. Before mailing the query letter, be certain you can follow through promptly and completely on what the query promises. A typical query letter might be:

Dear Mr. Smith:

We have just finished the largest exhibit reinstallation ever attempted by a museum. More than a quarter of a million objects were moved and re-exhibited under the supervision of our director of interpretation.

As an articulate interpreter of modern museum exhibit concepts, he would make an excellent subject for an interesting exclusive feature story in your magazine.

I have enclosed his vita. Please advise if you would like additional information.

Sincerely,

Following are a few suggested subjects selected from the many that might interest each type of magazine:
Historical and collector magazines
a.   new accessions
b.   curators and conservators and the work they do
c.   highlights of special collections
d.   exhibits, festivals, and other special events and activities
Sunday newspaper magazines
a.   photo feature on an interesting person on your staff, perhaps one who is engaged in unusual work that is of interest to the public, such as restoring old textiles
b.   photo features emphasizing artifacts and exhibits related to the special interests of readers in the circulation area of the Sunday magazine
Travel magazines
a.   travel consumer feature stories—how to get to your facility, the best time to visit, availability of food and lodging, special attractions for children—accompanied by photos of visitors enjoying your facility
b.   photo features of an annual special event such as a quilting bee—photos may be taken at the event this year to be used by the magazine in advance of the same event next year

Second Objective: Interest the Reader
Releases are of two types—news and feature. All use similar criteria for capitalization,

punctuation, and other stylistic considerations. Purchase and adhere to either an Associated Press or United Press International style book. The addresses for ordering the books are in the appendix of this leaflet.

■ News Story Content

Readers expect the who, what, when, where, why, and how of the story, not necessarily in that sequence, in the first paragraph. They expect these aspects of the story to be developed clearly in order of their importance with the least significant material at the end. This not only allows the readers to grasp the story without having to read all of it, but also allows the editor to cut from the end of the story to fit available space. Expect most dailies to rewrite at least the lead sentence to assure that they are not publishing the same story that will appear in their competitors' editions. Romancing of the subject, especially when a colorful special event or exhibit is involved, is permissable but should be done only to strengthen the most important elements of the story.

■ Hard News Story Content

Historical organizations seldom generate "hard news" stories—those dealing with subjects such as crime and disasters. When they do, the news release should be prepared and distributed promptly, should be straightforward, and should not attempt to conceal any of the facts, even if they can be construed by the reader to reflect negatively upon the organization. The release should present the institution's point of view and should emphasize actions being taken to solve or recover from the problems involved. For example, a "hard news" story might be:

XYZ Museum officials met last evening in the aftermath of yesterday's fire that destroyed a fine arts gallery to plan a $50,000 fund drive for an improved fire warning system, Museum President James Brown announced today.

He explained that although it exceeds state and federal requirements, the present system, which was installed in 1956, was not sensitive enough to detect the fire in its beginning stages. A more sophisticated system was proposed twice, in 1976 and 1978, but budget limitations prevented its purchase.

It is expected that the drive will reach its mark within eight weeks and the system will be functioning within three months. Until the new system is operating, the present warning devices will remain operable.

■ Feature Story Content

Most stories written about historical organizations are of a feature nature. While the news story emphasizes the bare facts, the feature story uses human interest anecdotes, colorful descriptions, interviews, moving narration, and vivid description. The beginning sentence in the feature story need not tell the who, what, where, why, how, and when of the news lead, but it must arrest the reader's attention and create the desire to read on. Most newspapers and magazines prefer to have a writer on their staff write their feature stories; thus, the publicist's role usually is to present sound feature ideas through a well-executed query letter.

Third Objective: Be Accurate

Historical organizations are seen by the public and the media as highly credible information sources. If a curator from XYZ Museum says it, it must be true.

The following guidelines will serve as a checklist to assure that you have done all you can to make your stories accurate.

1. In the role of publicist, rely on your curators for expertise but express the facts of the story in a language that will interest and be understood by the general reader. Copy can be just as accurate in clear and interesting language as it can be in scholarly jargon.
2. If there is any question in your mind about your facts, check them with the appropriate curator before releasing the story to the media. Make it clear that the curator will not have the opportunity to review the story again after the publication has it.
3. If persons in your organization do not have the answers to a question, be straightforward in telling the media that and suggest other sources.
4. On matters involving the general policy of your organization, consult your top executive in preparing the story and credit that person as the source.
5. Never release information on objects that are not on exhibit. Collectors are easily motivated to travel across the country to view objects that are of particular interest to them, and historical organizations can not afford to mislead or disappoint any visitors.
6. Never mention monetary values of artifacts to the media and avoid references to such factors as rates of appreciation and relative rarity among like objects. By selecting objects to accession and exhibit, museums

can not avoid affecting antique values in the marketplace, but overt value references should be avoided.

Photographs

Most newspapers have a greater need for interesting photographs than for copy.

The publicist for the historical organization with no staff photographer may suggest photo ideas to newspapers and magazines or may enlist local photo buffs or college photography students in taking pictures on a voluntary basis. An occasional photo contest sponsored by your organization with the requirement that all pictures be released for your use can yield excellent results at little cost. Learning to take and process good photos yourself is not difficult or expensive.

Once you have developed a capability to shoot and produce photographs, observe these guidelines to make your pictures useful to the media.

1. Stay with sharp, glossy, black and white 8x10 prints for newspapers. Occasionally, to cut cost and provide more photos, consider printing four different photos on one 8x10 sheet. Don't use paper clips which can mar the surface of the photograph.
2. Keep your photos simple, no more than two or three people, and fill the frame with the subject—avoid a band of grass in the foreground, a band of subject in the distance, and a band of sky.
3. When possible, plan your picture so the print can be cropped to horizontal, vertical, or square formats.
4. Photos tend to darken when printed in newspapers. Be sure the subject is well lighted and lean toward overall lightness in the print.
5. Publications almost always prefer people in the photo. They should be doing something. No one should be looking at the camera and all should be identified. Photograph people enjoying your collections and facilities but be sure they are doing only the things the general public is allowed to do. If you do not allow the public to sit in your collection chairs, do not picture a model sitting in one.
6. Never release photos that were taken randomly of visitors whose faces show clearly enough so they can be identified unless you get the permission of the persons in the photo. Who knows, the man in the photo could be on a weekend holiday with his neighbor's wife! When photographing visitors, ask them to sign a simple release

When taking photographs for press releases, fill the frame with people enjoying your facilities.

form and be sure you get their names and the city where they live so you can identify them in the caption. A signed release form is especially important if you ever use the photo for paid advertising for your organization. A sample of a release form can be found in the appendix.

7. Publications like close-up pictures that show action. They do indeed like children, pretty girls, and pets in photos. They like subjects photographed from a unique angle such as a highwheel bicycle rider photographed straight up from the ground.

8. Never send the same photo to two

Publications are more likely to use your photographs if they can be cropped either vertically or horizontally.

publications that are read in the same community. Instead, take several pictures of the same subject, each from a different angle. You will be safe even if the variation between photos is small.

9. Avoid releasing photos of collection replica artifacts. If you do, indicate they are replicas.

10. Compile a small file of 35 mm slides. Nearly all publications, including glossy magazines, will use 35 mm, but many prefer original slides rather than duplicates. Most can not be counted on to return the slides when they are finished with them. Thus, it is advisable to shoot the same subject several times, giving yourself file copies of original slides. Shoot several of your slides in a vertical format keeping in mind that magazines often print color only

on their covers. You may wish to compose some of your vertical slides with open sky spaces in the upper right corner where magazines can print their name and other cover material. Shoot exterior slides in each season of the year and be certain you have good slides of all exhibits and events that are held annually for use in advance promotion.

11. Compile a more extensive file of 8x10 black and white glossy prints and have a number of duplicates of your best photos on file all the time. Number your negatives as they are filed and rubber stamp, do not write, the negative number on the back of each print to make reordering easy. Whenever possible, keep all negatives in your possession as most of your print orders will have to be processed quickly to

meet media requests. Do not write on the back of prints as your writing may show through when the photo is processed for offset printing.

12. Spend time writing your photo captions. The captions may be the most widely read copy in your story. Make them brief, bright, and interesting. Attach the caption to the back of the photo with a small amount of rubber cement or tape. Rather than using separate caption sheets for each color slide, number the slides and key the numbers to captions typed on a single sheet of paper.

13. Prints always should be packed for mailing between two pieces of light cardboard the same size as the photos. Slides are best mailed inserted in the plastic pockets of 8x10 slide protector sheets designed for ring binders and available at photo stores.

14. During peak visitor seasons, most historical organizations restrict all disruptive photography involving set ups with lights and models to hours before the museum opens to the public or after it closes.

15. Be sure that someone from your organization's staff accompanies visiting photographers at all times. For their protection and yours, never allow a visiting writer or photographer to handle any artifacts.

Beyond the Basics

Given a small budget and at least one full-time promotional person with clerical assistance, many additional promotional tools can be implemented.

■ A writer's guide, updated and reprinted annually in large enough numbers to mail copies to all writers at all newspapers and magazines in your major market area, is a valuable resource for writers and a useful handout for visiting media. A typical writer's guide might contain:

1. A description of your organization, when it was founded, its history, type of collections, and location with instructions on how to reach the facility by public and private transportation;

2. Telephone number, hours, admission price and special admission rates, description of food, gift, and souvenir outlets, and a list of convenient campgrounds, hotels, and motels;

3. A list of crafts that are practiced and other special attractions that operate daily;

4. Educational programs;

5. Library facilities that are available to the public and other public services offered by your organization;

6. List of special events and dates;

7. Brief description of each of the major collections, perhaps citing examples of one or two of the outstanding pieces in each collection area;

8. A list of curatorial persons by name and area of expertise—note in this section that writers should be encouraged to contact curators through you.

■ An events calendar can be issued bi-weekly or more often depending on the number of public events offered by your organization. It should be mailed to calendar editors at newspapers in your major market area. Newspaper calendars provide one of the most important vehicles for making the public aware of what is going on at your organization and also generate media interest in covering your events.

■ A periodicals calendar mailed one quarter in advance of the period it covers—mail January 1 for the period April, May, and June—is important for magazines that have long lead times. A quarterly periodicals calendar often will make the difference in whether a magazine is able to carry a mention or a story on an event at your organization.

■ Fillers mailed monthly or quarterly are useful to editors who need short one or two paragraph stories to fill holes in their page layouts. Try to make the filler shorts relate to such subjects as current issues in the news and anniversaries of the invention of artifacts in your collections. On two sheets of paper you can include six short filler features.

■ A stock of general press kits that include a writer's guide, background story on the history of your organization, a current events calendar, and background summaries of your collections and your educational and special events programs can be left at the entrances to your facilities to be given to media visitors who arrive unannounced on weekends or at other times when you are not around.

■ If budget allows, you might consider a press preview of an exhibit with cocktails and refreshments or an annual press family day with refreshments and entertainment. Writers are accustomed to fine treatment at such affairs, so avoid holding them unless you have the budget to do them well.

■ As your budget grows, you might consider buying some outside services to help you reach more newspapers and magazines and to make it easier for you to evaluate your work. These services include:

1. A clippings service, which can be contracted to clip stories published on your organization in newspapers in your state or on regional or national levels, can help you see which publications you are most successful with and can provide you with a portfolio of results to use in documenting your work. By keeping track of which newspapers are carrying your stories, you may find that some are not using any of your material. Knowing that, you may wish to make personal calls on their editors.

2. Mat services, that for a fee distribute your short features to their member newspapers, will produce a lot of clippings but usually are expensive and most successful in placing stories only in small circulation newspapers.

3. Newswires, which usually are available only in large cities, will send your release over their wires to subscribing media. Their fee is based on your choice of city, regional, or national distribution. If you are in a metropolitan area, the newswire can be a good vehicle to use in reminding the press of a special activity.

4. Mailing services, especially those that are computer based and keep all media up to date by name of editor, can be an effective investment if you wish to make a national or even large regional mailing of writer's guides or other materials and you do not want to trust your own lists or miss any important editors.

5. Public relations counsel, although perhaps rather expensive when retained full-time, could be contracted for important special projects such as the promotion of a fund-raising program.

APPENDIX

Selected Samples of Services and Publications

Classes
NYU Business and Management Programs
Room 1412, 310 Madison Avenue
New York, New York 10017

Clippings Services
Luce Press Clippings
420 Lexington Avenue
New York, New York 10017

Burrelle's Press Clipping Service
75 East Northfield Avenue
Livingston, New Jersey 07039

Mailing Services
Public Relations Aids, Inc.
221 Park Avenue South at Eighteenth Street
New York, New York 10003

Mat Services
Derus Media Service
6 West Hubbard Street
Chicago, Illinois 60610

North American Precis Syndicate, Inc.
220 West Forty-second Street
New York, New York 10036

Media Directories
Ayer Directory of Publications
Ayer Press
210 West Washington Square
Philadelphia, Pennsylvania 19106

Syndicated Columnists
R. Weiner, Inc.
888 Seventh Avenue
New York, New York 10019

Newswires
Press Relations Newswire
24500 Southfield Road
Southfield, Michigan 48075

Public Relations Handbooks
Effective Public Relations
Cutlip and Center
Prentice-Hall, 1978

Public Relations Handbook
Philip Lesly
Prentice-Hall, 1978

Style Books
The Associated Press Stylebook
The Associated Press
50 Rockefeller Plaza
New York, New York 10020

The UPI Stylebook
United Press International
220 East Forty-second Street
New York, New York 10017

Model Photograph Release Form

Name of Organization
I hereby consent to and grant (your organization) permission to use for publication, advertising, and exhibition photographs of me taken at _____ either using or not using my name.

_____
Subject's Signature

_____
Witness   Subject's Name (printed)

_____
Subject's Address & Phone

_____

Since 1974, G. Donald Adams has been manager of the print media services department of Greenfield Village and Henry Ford Museum in Dearborn, Michigan, and has served as curatorial consultant since 1976. He holds a BS degree in public relations with an additional thirty-three hours of graduate credit in this field of study. Before joining Greenfield Village and Henry Ford Museum, Adams worked in college public relations. He has presented numerous papers on the subject of public relations for historical sites and museums to professional organization meetings and seminars, including the 1977 AASLH annual meeting and a 1979 AASLH seminar. Adams is also midwest regional director of the American Association of Museums standing professional committee on public relations and communications. All photographs in this leaflet are courtesy of Greenfield Village and Henry Ford Museum.

A press release should contain a release date, a suggested headline, a dateline, and an in-house code which allows you to identify who wrote the release, when, and to whom it was sent. The release should be double spaced and written in a clear, concise style.

American Association for State and Local History
1400 Eighth Avenue, South
Nashville, Tennessee 37203

TECHNICAL LEAFLET 124

Technical Leaflets are published by the American Association for State and Local History for the purpose of bringing useful information to persons working in the state and local history movement. The selection of subject matter is based upon varied inquiries received by the Association's home office. The leaflets,

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Reprints are available. For information on prices, write to the Association at 1400 Eighth Avenue, South, Nashville, Tennessee 37203.

Technical
LEAFLET

Training for Docents:
How to Talk to Visitors

by Gerald H. Krockover
Purdue University
and Jeanette Hauck
Indianapolis Children's Museum

DOCENT: *Now let's all move to the dinosaur
exhibit. This is a life-size model of
Tyrannosaurus Rex. It was about
fifty feet tall, and its jaws were
about four feet long. Tyrannosaurus
Rex lived about seventy million
years ago and ate meat. Before we
move to the next exhibit, are there
any questions?*
CHILD: *What kind of meat did the dinosaur
eat?*
DOCENT: *Other dinosaurs. Any other
questions? If not, let's proceed to the
next exhibit area.*

* * *

A museum serves as a repository for some of
the most fascinating and interesting exhibits
available to the public. A key component in
presenting these exhibits to school groups and

the general public is the guided tour given by a
docent who may or may not have been trained
through a docent education program.
Unfortunately, many docent education
programs simply focus upon improving the
subject-matter background of the docent rather
than including an equal dosage of methods and
techniques for involving the museum visitors in
the tour. The development of an effective
questioning technique enables the docent to
focus each visitor's attention upon the museum
object being explained, thus enriching the
museum tour.

Training Workshops

Conducting workshops for docents that focus
upon the development of question-asking skills
and techniques is one way to improve guided
tours. The workshops might include such topics
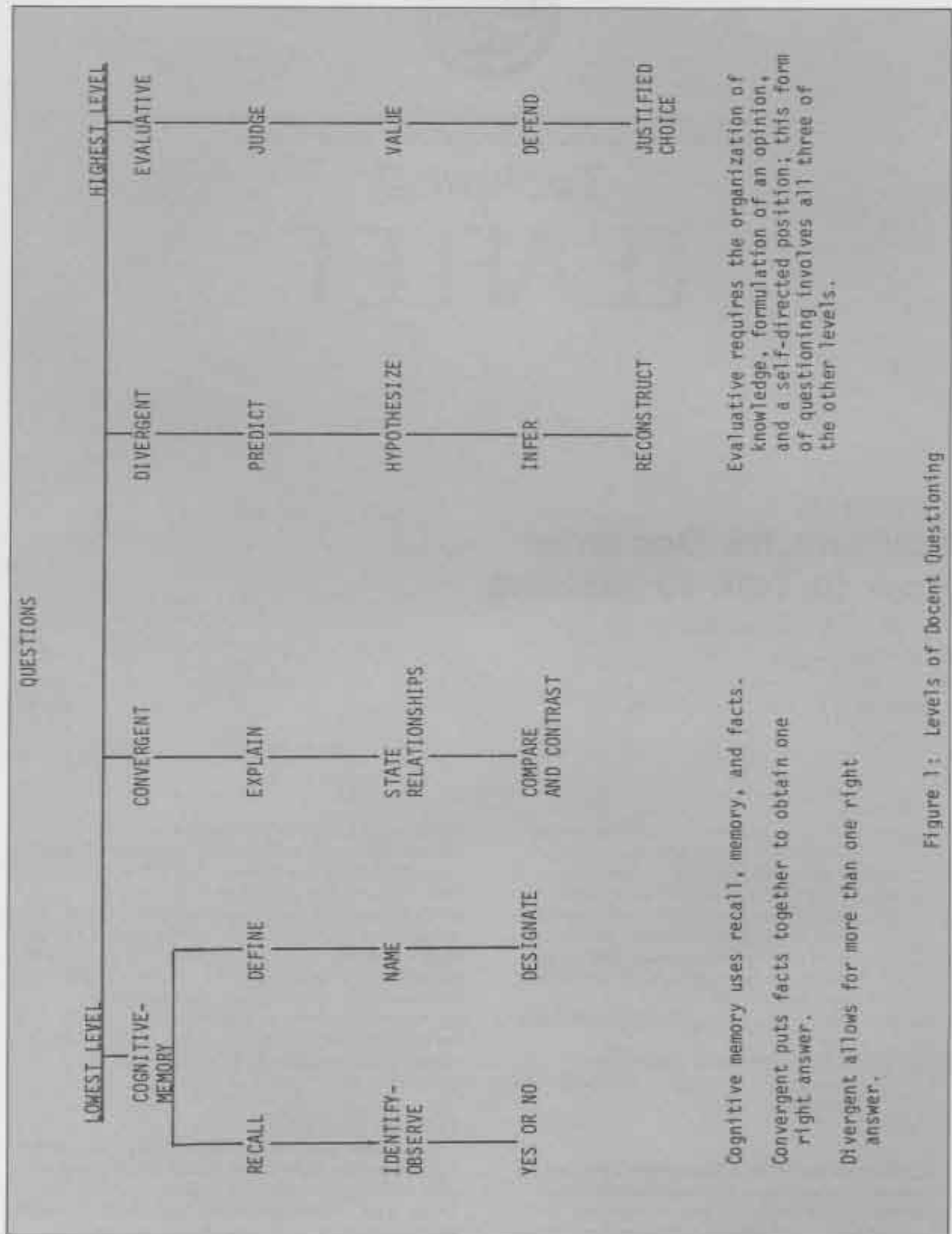as the role of questioning in conducting tours,

QUESTIONS

LOWEST LEVEL			HIGHEST LEVEL
COGNITIVE-MEMORY	CONVERGENT	DIVERGENT	EVALUATIVE
DEFINE	EXPLAIN	PREDICT	JUDGE
NAME	STATE RELATIONSHIPS	HYPOTHESIZE	VALUE
DESIGNATE	COMPARE AND CONTRAST	INFER	DEFEND
RECALL		RECONSTRUCT	JUSTIFIED CHOICE
IDENTIFY-OBSERVE			
YES OR NO			

Cognitive memory uses recall, memory, and facts.

Convergent puts facts together to obtain one right answer.

Divergent allows for more than one right answer.

Evaluative requires the organization of knowledge, formulation of an opinion, and a self-directed position; this form of questioning involves all three of the other levels.

Figure 1: Levels of Docent Questioning

Directions: Go to the _____ area. Write
(Insert Name)
one cognitive-memory question, one convergent question,

two divergent questions, and two evaluative questions that

you could use with a group of school children.

Also prepare two thinking games that you could use

that relate to these questions.

Sample docent activity card.

levels of questioning, developing questions, and evaluating questioning techniques. An additional feature useful in these workshops is the involvement of the docents in the development of their own questions. This can be accomplished by utilizing activity cards rather than simply having the docents listen to the "experts" present their opinions.

The docents probably will discover quickly that the key to a successful tour is not only that body of knowledge they have mastered, but also how well they involve the tour group through questioning. Figure one outlines the different levels of questioning that may be used during tours. Docents should be encouraged to analyze the levels of questioning and practice asking questions at these levels in the cognitive (content) and in the affective (attitudinal) domains of learning. After the docents have developed some competence in recognizing and using the varying levels of questions, they are presented with an individual activity card, shown in figure two, which requires going out into the exhibit area and preparing questions for each of the levels of questioning that could be used with a tour group.

The docents then return to the workshop area to discuss the questions that they have developed and to analyze the questions for clarity and effectiveness. The questions prepared by each docent are collected and classified by exhibit area resulting in a set of questions for each exhibit area that will be made available to all docents. Thus, each docent has acquired not

only the ability to ask a variety of questions, but also a packet of questions to serve as a resource for future tours.

Questioning Levels

As indicated in figure one, questions can be classified into the thought level required of the person by a docent's question. Most docents simply ask cognitive-memory questions because they have not been made aware of the level of thought which their questions can and do elicit in their tour groups. Docents need to understand that a question asked at a given level will result in a response identified with that same level. In other words, a cognitive-memory question, the lowest level, will cause a cognitive-memory response and so forth.

To illustrate questioning levels, let us examine each of the four levels and utilize examples from specific docent questions:

1. *Cognitive-Memory Questions* require the lowest level of thought on the part of the person responding. They demand recall, memory, recognition, description of previously obtained factual knowledge, or observation. These questions call for predictable responses and often demand only one-word answers from the respondent. Examples of cognitive-memory questions include:

*What kind of animal is this?
*What year did the Indians leave this area?
*Can you see any differences in the various

When demonstrating an artifact, a docent should ask questions that require the visitors to think about the item and draw their own conclusions about its function and the people who used it.

Indianapolis Children's Museum

kinds of Indian pottery?
*How was slate used by the Indians?

We have found that most docents only ask these types of questions.

2. *Convergent Questions* include more broad types of questions that demand putting facts together in order to obtain one right answer. The respondents are required to know facts and, using their own words, to explain concepts and describe their interrelationships, solve problems, or make comparisons. Examples of convergent questions include:

*Can you explain the differences between the Woodland Indians and the Southwest Indians?

*What comparisons can be made between the Indians and French settlers with respect to trading?
*What is meant by the word "pioneer?"
*How is this mattress like that one?

3. *Divergent Questions* not only provide the respondent with a new situation, but also allow for more than one possible right answer. These are questions that permit originality by the respondents which is evident in the hypotheses they make and in the way they use their knowledge to solve new problems. Divergent questions are those that permit predicting, hypothesizing, and/or inferring. Examples of divergent questions include:

Once questions are asked, docents should not be too quick to give the "right" answer but should allow answers to be tossed around among all members of the tour.

*What material do you think is inside each of these mattresses?
*Suppose you were trying to convince someone to trade one of their articles for one of yours. How would you do it?
*What do you think the Indians used porcupine quills for?
*Suppose you wanted to make a model of a French trading post. What would you include in your model?

4. *Evaluative Questions* require the respondent to judge, choose, value, or defend. They cause the respondent to organize knowledge, formulate an opinion, and thereby assume a self-directed position. In order to make a judgement, the respondent has to use evidence which in turn requires the use of criteria. The visitors make judgements of good or bad, right or wrong, according to standards that they designate or to standards someone else has established. This is the highest level of questioning and involves all three of the other levels. This level of questioning is used least by docents. Examples of evaluative questions include:

*Which exhibit do you prefer and why? What constitutes a "good" exhibit?
*Do you think that the trading between the Indians and the French settlers was fair? Justify your answer.
*Which of these pioneer mattresses would you prefer to sleep on and why?
*Why did early man paint on cave walls? Does modern man paint on cave walls today? Justify your answers.
*Why do you think the wearing and collecting of jewelry is valued so much by people?

In conducting a tour, it is important to use a variety of levels in your questioning and to make questions clear, concise, and to the point. What do you think this is? How do you think it was made? What do you think it was used for? Why do you say it was used that way? All are examples of good questions.

Docents are usually too eager to spout off at once all the facts about an exhibit without giving visitors time for observation and thinking. Once questions are asked, answers should be tossed around to all members of the tour group, not just between the docent and one

tour group member. Docents should not be too quick in giving the "right" answer; they need to learn to wait for answers when asking thinking questions. On the average, docents wait only one second for a response before answering their own questions. Try waiting two to four seconds for a response, and you will find that the interaction level will double or triple. At some exhibits you might begin by asking, "Tell me what you already know about this exhibit." You may be pleasantly surprised.

Self-Evaluation

To determine your questioning effectiveness as a docent try this eight-step evaluation.

1. Give yourself one point each time you ask your tour group what they know about an exhibit *before* you start your presentation.
2. Measure how many seconds you wait for a response. Give yourself one point if you waited longer than two seconds for a response.
3. Give a point if you developed interaction between the members of your tour group rather than simply between yourself and one other person.
4. Give a point each time you ask an evaluative question.
5. Give a point each time you reinforce an answer without saying that the response is correct.
6. Give a point each time you do not stop discussing a point when the "right" answer is given, but ask if there are other answers.
7. Give yourself a point each time you ask a question requiring predicting, hypothesizing, inferring, or reconstructing events.
8. Give yourself a point each time you are a good listener.

Such self-evaluation should help docents improve their questioning skills and result in more effective tours of your historical site or museum.

Conclusion

It has become increasingly evident that in museums where this approach to improving docent questioning techniques has been employed, questioning methods have improved and that docents are more aware of the types of questions that can and should be asked. It is important to remember that if we removed all the labels from an exhibit, there would still be a wealth of information to be gleaned by a visitor through such questioning. This method, more than any other, utilizes those observational

skills that the visitor brings to the museum.

Returning to our dinosaur exhibit, one can now hear:

* * *

DOCENT: *Can you find a close relative to Tyrannosaurus Rex in this room? Put your hand up when you've found it.*

DOCENT: *How would you change Tyrannosaurus Rex's legs to look like Archaeopteryx's legs?*

DOCENT: *Of all the reptiles we have discussed, why do you think that certain types have continued to live while others have become extinct?*

* * *

These types of questions cause the visitor to think and pursue an active role in the tour. Providing more stimulating and informative tours may help promote active visitor support, requests for additional information, and return trips to the museum. We feel that such workshops will enable the docents to ask a better variety of questions and to more actively involve visitors in their tours. Additional docent workshops can then focus upon an analysis of the questions developed in the first workshop and methods for continued improvement.

Glossary of Terms

Affective—area of learning dealing with attitudes.

Cognitive—area of learning dealing with content.

Cognitive-memory—area of learning that includes recall, memorization, and facts.

Convergent—putting facts together to obtain one answer.

Designate—the individual selects an object or event from two or more that might be confused.

Divergent—putting facts together to obtain more than one answer.

Evaluative—requires the formulation of an opinion or self-directed position.

Hypothesize—to generalize statements of explanation.

Identify—the individual selects a named or described object by pointing to it, touching it, or picking it up.

Infer—involves the interpretation of an observation.

Name—the individual specifies what an object, event, or relationship is called.

Predict—a specific forecast of what a future observation will be.

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Technical LEAFLET

Planning and Conducting Successful Seminars and Workshops

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Whether devising educational programs for the public or developing training programs for historical-agency staff, whether planning two-hour programs or two-week offerings, the requirements for success are the same. Seminar and workshop coordinators must understand how adults learn, know what learning is needed and plan effective ways to facilitate it, and provide a conducive setting in which it can occur.

Understanding how adults learn
According to Malcolm S. Knowles, one of the nation's foremost adult educators, adult learners differ from child learners in four critical ways. Adults are self-directed. They have experiences that can be built upon. They are motivated by

the developmental tasks of their social roles. And they want learning that has immediate application.

Adults are self-directed. Children enter into the world in a state of dependency. That dependency, encouraged by adults, becomes a self-concept that is generally retained throughout youth. It is reinforced by the traditional educational process. Parents, teachers and curriculum planners all tell children what they must learn. Adult learners, on the other hand, are largely independent. Their self-concept is one of self-direction. They can and will choose what they learn, and this has a number of implications for educators. It means that adults will be more highly motivated than children. It means that adults will want to participate in the instructional process. It means that if they are given an opportunity to help plan their learning activi-

A seminar coordinator's survival kit contains items ranging from Bandaids to projector bulbs.

ties, they will learn more effectively. And it means that they must be instructed in appropriate physical and psychological climates. In short, adults require friendly instructors, informal settings, individualized attention and participatory learning activities.

Adults have experiences that can be built upon. Any group of 30 children, randomly selected, will have much more in common than any group of 30 adults, randomly selected. Adults have accumulated more experiences than children, and this can both hinder and benefit learning. It can hinder learning because adults tend to have fixed habits and patterns of thought and therefore often are less open-minded than children. On the other hand, the experience of adults can benefit learning because a variety of teaching techniques can be used to draw upon those experiences. Group discussion, role playing, simulation exercises and case projects are a few examples. All of those are experiential or participatory, learner-centered activities. They enable participants to *experience* principles, problems and issues, as well as various responses to them. In such activities each adult learner adds a special perspective or point of view that is instructive in some way to other individuals.

Adults are motivated by the developmental tasks of their social roles. Children learn best those things—developmental tasks—that they must know to move from one stage of psychological and mental development to the next. Each stage presents a teachable moment, a time when the child is ready to learn. Adults have developmental tasks and teachable moments too, but those result chiefly from evolution of social roles. Adults learn best those things that seem likely to benefit them in their work, leisure activities and relationships with others. In short, what adults are willing to learn at a given moment depends in large part upon where they are in the course of their own personal growth and development.

This has implications both for the sequence in which learning can occur and for how learners should be grouped. For example, if a workshop coordinator is training role-assuming interpretive docents, he or she should not try to teach them theatrical techniques for a particular character role until they have learned the appropriate historical background necessary to understand that role. If a workshop coordinator wants to teach a group of museum personnel how to design exhibits, he or she should first be certain that each understands the functions of museum exhibits and has, as well, a strong personal interest in how they are designed. And if an adult educator in a central-Kentucky agricul-

tural museum wants to conduct a seminar on the history of farming for academicians, that coordinator should not begin the seminar in the same way he or she would if most of the participants were farmers, political leaders or urban business leaders. Each of those groups would require at least a different introduction and probably a different sequence, or even different kinds, of learning activities.

Adults want learning with immediate application. Children have to learn facts and concepts that are accumulated, stored and used at some later time when they may or may not be applicable. Adults do not have time for that. Adults want facts and skills that have immediate relevancy. If adults cannot see some immediate use for information or skills—if that information and those skills are not enjoyable or practical in terms of their own individual needs—then adults will not be interested. Thus, a seminar or workshop coordinator must carefully assess audience needs and interests and provide programs that meet those.

Planning a seminar or workshop

Assessing needs and interests is the first of seven basic components of successful seminar and workshop planning. The others are analyzing resources, selecting high priority objectives, selecting and organizing learning activities, selecting instructors, determining format and developing a plan of evaluation.

Assessing needs and interests. The purpose of any historical-agency educational or training program—seminar, workshop, audiovisual presentation or whatever—should be to enhance knowledge of the sponsoring institution's collections or field of interest or to improve the skills of individuals who work toward those ends. To learn effectively, the individual must have a *need* to know the material and skills the program offers. A variety of sophisticated survey techniques are available with which to assess audience needs, but there are also some relatively simple, yet fairly effective ways. The first is through expressed preferences. A seminar or workshop coordinator can ask—either verbally or in a simple questionnaire—persons attending one kind of program whether they would attend or prefer some other kind of offering. The second is through demonstrated willingness. It is possible to draw conclusions about audience preferences simply by observing which kinds of programs people attend and which kinds they avoid. The third is through the conclusions of experts. A coordinator at one institution can find out what kinds of programs have worked for other institutions similar in purpose, collections and location. For best results, the coordi-

nator should use all of these methods and compare the findings.

Analyzing resources. Any educational or training program that an institution offers must be appropriate for that particular institution's purpose and other programs. It must also be appropriate for the institution's financial resources and personnel, both paid and volunteer. And decisions about what programs to offer must take into account the current offerings of other, similar institutions. For example, in Tucson, the Arizona Historical Society offers a highly successful historical film-lecture series using movies shot on location in Tucson since the 1930s. This series has proven an excellent way to draw new visitors to the society and both entertain and instruct them. Although the program is successful, the Arizona State Museum, which is situated across the street from the historical society, probably would not want to duplicate it. A different kind of program geared more to Arizona State Museum collections and other audience needs would have a better chance of attracting new adult visitors to that institution. Similarly, if the Arizona State Museum offered an effective exhibit-label-writing workshop for historical-agency personnel throughout the state, and everyone who wanted to attend could do so, there would be no need for the historical society to offer a similar program.

Selecting high priority objectives. When planning any new seminar or workshop, a coordinator is likely to identify many more worthwhile objectives than can easily be accommodated in any one learning activity, session, seminar or series of seminars. Still, he or she should list all those objectives on paper. The coordinator should then screen them for desirability and feasibility and select only those that are important for basic program purposes and that are realistic in view of the institution's resources and audience. In addition to helping with planning, high priority written objectives, if stated in terms of intended participant knowledge, skills and attitudes, will help learners know what to expect from the program and will help instructors know what they are expected to contribute to the program. A much better program will result.

Selecting and organizing learning activities. Because adults learn best through participation, it is desirable to plan for participatory learning activities. There are several from which to choose, including role playing, simulations and case projects. To select the kind of activity that is best for a particular program, keep in mind the following: (1) appropriateness for the objectives and content, (2) suitability for the audience, (3) effectiveness in relation to particular stages of the program, (4) variety, (5) compatibility with teaching styles and (6) amount of time available.

Selecting instructors. Effective instructors are critically important for the quality of any seminar or workshop. To select them successfully it is necessary to know the characteristics of an effective instructor. Effective instructors must be knowledgeable about their subject matter. They must be good teachers or willing to learn how to become good teachers. They must be able and willing to devote adequate time to preparing for their presentations. They must be willing to work with the coordinator to shape their presentations to program objectives. And they must be able and willing to spend sufficient time at the seminar or workshop site to meet partici-

At the seminar, set up a display area for brochures that participants may bring from their own institutions.

pants and get the feel of the program prior to speaking and then to talk with participants afterward.

To be sure of obtaining instructors who possess those qualities, a program planner should first investigate potential instructors. Observe them at the programs of other institutions and at annual meetings and similar functions. Talk to colleagues who may have heard them speak or "perform." Solicit resumes from potential instructors and interview them in person or by phone.

Next, a seminar or workshop coordinator should approach potential instructors with confidence. To be timid and assume that a

potential instructor would be doing a program a great favor merely by appearing is a sure way to ruin it. Be polite, of course, but also be aware that to ask a potential instructor to participate is to do him or her a favor. Most effective instructors are motivated by both professional pride and dedication to their field.

If selected instructors are not accomplished teachers of adults, help them understand the special ways in which adults learn. Give them a detailed memo, letter or set of guidelines on the subject. Provide all instructors with specific information about the backgrounds of the learners so that they can gear presentations specifically to the audience. Then evaluate instructors' performances and share that information with them so they can make adjustments for future presentations.

Finally, reward good instructors. Whether the reward is an honorarium, a book, a nice letter or a simple pat on the back, it will pay important dividends the next time that instructor is needed to help with an educational or training program.

Determining format. Successful seminars and workshops must be of appropriate length for both the participants and the topics being treated. And so must individual sessions. Those must follow in logical sequence, and the entire program must be paced in a manner that will hold participants' interest but not tire them unduly.

A number of variables help determine program length. Those include the subject, depth of coverage, educational and experiential levels of the participants, amount of time they can devote to the program, amount of time the coordinator and the sponsoring organization can devote to it, and cost.

Once length is determined, there are several steps in scheduling individual sessions. After reviewing overall program objectives, the nature of the audience and the budget, the coordinator must determine a variable time frame based upon specific session topics. The first step is to decide which will be formal, instructor-led sessions and which will be informal sessions. Sessions can vary in length from one to three hours. Sessions can be lectures, panel discussions, participatory learning activities or a combination of those. Before actually scheduling sessions into hard-and-fast time slots, consider other kinds of seminar or workshop activities. These can be receptions, registration procedures, participant introductions and presentations, field trips and tours, box lunches or other kinds of planned group meals and some kind of final dinner or celebration. Whatever sessions and activities are chosen, they should be sequenced logically and in a way that ensures variety.

Seminars and workshops must be properly paced. They should be scheduled tightly but not oppressively. If given a choice, participants prefer to make full use of their time. Beware of scheduling big chunks of free time without offering an optional activity, such as consultations with instructors or tours of museums. On the other hand, do not be unrealistic in allotting time. Remember that there will be questions, answers and discussion. No matter how strict a timekeeper the coordinator is, sessions—especially good, provocative ones—more often run overtime than end early. Schedule some "soft" time between sessions and between activities to allow for transitions.

Once a coordinator has developed a preliminary schedule, he or she should expect it to go through numerous changes before it emerges in a final form. Usually it helps to prepare a preliminary schedule in a chart format and have other persons check it for possible overlaps or discrepancies. The final printed schedule should be neat and legible. It should indicate sessions and activities, times, locations and instructors. It should also contain capsule session descriptions, but it should not be overloaded with minor details.

Developing an evaluation plan. When a seminar or workshop is concluded, it is desirable to know whether, or how well, it succeeded. Whether the evaluation tool is oral or written, it should tell the coordinator whether he or she planned effectively, matched the program to available resources, selected appropriate objectives, met those objectives, used appropriate learning activities, chose instructors successfully and fulfilled the needs of the audience. The method of evaluation should be selected and the evaluation tools designed and prepared during the seminar or workshop planning process.

Conducting a seminar or workshop

Once the seminar or workshop has been planned—the session chosen and organized, the instructors selected and the format determined—the coordinator must arrange for a conducive setting. This requires paying special attention to a number of logistical variables.

Deciding what to take and what to send. A seminar or workshop can take place in the sponsoring organization's facilities, across the street from them or across the country. Regardless of proximity, the coordinator must ensure the presence of necessary supplies and equipment. Even if the coordinator can arrange to have some equipment and supplies provided at the site, there will still be essential items that he or she must either send ahead or pack to carry

to the program. Taking too much or too little or being caught short of a needed item, can ruin an otherwise well-planned program.

Necessary program equipment and supplies can include, but are not restricted to:

• *Seminar packets or notebooks.* These can include the final program, instructor and participant lists and biographies, evaluation forms, expense report forms, session outlines, copies of the learning objectives, other instructional materials and information about the sponsoring organization and host institution.

• *Name tags.* These should be typed or printed in large, legible letters for participants, instructors and hosts. Some coordinators prefer to include individuals' titles; others prefer to delete titles or all but first names in order to facilitate group interaction.

• *Exhibitable publications and materials.* Providing a table on which participants, instructors, hosts and the sponsoring organization can display publications also encourages group interaction.

• *Tape recorder and tapes.* Recording the sessions can facilitate evaluation. If sessions are to be recorded, don't forget necessary jacks and cords.

• *Seminar survival kit.* Every coordinator needs a survival kit, or a portable "coordinator's friend." This can include such necessities as extra pens, pencils, several kinds of tape, twine, scissors, paper punch, small pocket knife, slide-projector bulb, gavel, chalk and chalkboard eraser, large marking pens, extension cords, sewing kit and first-aid kit.

Which supplies to take along and which to send ahead depends on several factors. Send ahead items that can be prepared or packed early and that are not irreplaceable. Take along items that are of great value and materials that must be updated at the last minute. A checklist is a necessity when packing equipment and supplies. Pack all materials in sturdy, clearly labeled boxes. Address cartons sent ahead to a contact person, not just to a destination, and mark them to be held for the coordinator's arrival.

Running the program. Once program materials have been sent or packed to travel, the seminar or workshop coordinator should be ready for the on-site activities. Whether the program is being held down the hall, across town or in another city, plan to arrive well in advance, a few hours or even a day, to meet with any persons who may be assisting with logistical arrangements and to make certain that all are in order. One or several meetings with representatives of the host institution and hotel to go over checklists can make the difference between a

The seminar packets contain a final program, faculty list, session outlines and other materials the participants will need.

smooth, trouble-free program and one that is fraught with unanticipated difficulties. Discuss and clarify the final schedule, contracts, billing procedures, special events, transportation, division of responsibilities, contingency plans and special requirements. Be prepared to confer further with these individuals as needed during the course of the program.

Next, check the meeting facilities, even if they are familiar, and make certain they are arranged in a way that is conducive to learning. Space is a key factor in any good seminar or workshop. The ideal meeting room is spacious, well-lit and temperature-controlled and has movable tables with comfortable—not squishy—chairs. Furniture arrangement should vary according to learning activities. For most activities that involve 10 to 35 persons, tables arranged in a U-shape or classroom format work best. Be sure that the meeting room can be darkened for audiovisual presentations and that it has an easel, chalkboard, head table or podium, and any other necessary equipment. Locate light switches, electrical outlets and thermostats ahead of time. When sessions are underway, the coordinator should sit near the speaker and in a location where he or she can facilitate discussion, and also have easy access to lights and audiovisual equipment.

Once the seminar or workshop is underway, the coordinator can—and should—wear a number of hats. To ensure that program goals are achieved, he or she must be prepared to handle a variety of responsibilities ranging from keeping things on schedule to assisting with instruction, attending to amenities and dealing with emergencies and annoying circumstances, such as equipment failure or less-than-perfect
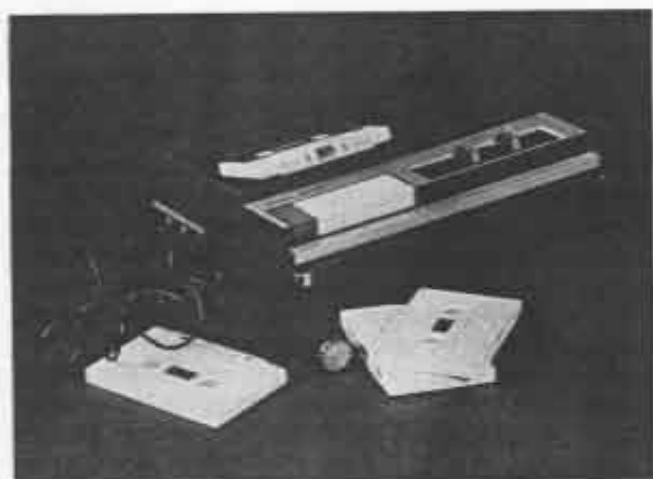
You may want to make tapes of the sessions to use later for evaluation purposes.

hotel service. This reassures seminar and workshop participants that someone is "in charge."

The coordinator's first task during the program is to greet and introduce participants, instructors and hosts. An informal opening session —such as a brief reception or registration time— is a good way to begin. Whatever the event, it should set an appropriate tone for the program and make everyone feel relaxed and comfortable in the learning environment.

Time is particularly important in a seminar or workshop, and the coordinator is the time-keeper. He or she must instill in the group a sense of punctuality. Always begin sessions on time. Remind instructors that they must adhere to the schedule and then alert them when their time is running out. Don't delay starting sessions on time because of a few stragglers. If an instructor is late in arriving, proceed with a contingency activity. But get started. Otherwise, participants and instructors will assume that for future sessions 9:00 a.m. *really* means 9:20 a.m. There are, of course, certain instances when operating flexibly and changing the schedule can enhance a program. However, when making such changes, be aware of the overall effects that they can have. For example, accepting an unanticipated opportunity to take exhibit-design workshop participants through an exciting new exhibit gallery might help them understand several learning objectives, but it might also deprive them of time to consult individually with instructors.

The coordinator is also responsible for seminar and workshop "creature comforts," regardless of where the program is being held—in a hotel, another historical agency or some other setting. No matter how trivial those considerations may seem, people do not learn when they are uncomfortable. See that meal and coffee-break schedules are adhered to, room temperature is comfortable, noise is controlled and restrooms, lounge areas and eating facilities are accessible.

Every coordinator has his or her own "style" for running a seminar or workshop, depending upon personality. No one style is better than another so long as the coordinator is both professional and cordial. Whatever style he or she pursues, the coordinator must serve as the primary facilitator and discussion leader for the program and ensure that participants leave with their money's worth: a worthwhile educational experience. To do that, it is necessary, by example, to instill at the outset and then maintain throughout the program a relaxed mood of inquiry and learning.

Evaluating the program. Schedule an evaluation session during the last day or hour of the seminar or workshop and elicit participants' thoughts and opinions about the program. Begin the session with specific questions and lead the discussion of those, but also be sure that participants have a chance to talk about any aspects of the program they want to. Take notes and offer explanations when necessary but avoid making defensive rebuttals. Be prepared to hear both positive and negative comments. Remember that although some participant suggestions may not seem at the time to be directly applicable or feasible, all should be noted for later consideration. Finally, even if no formal written evaluation form is used, encourage participants to submit any special concerns in writing.

Following up the program. Once a seminar or workshop is over, the coordinator will most likely be exhausted, but his or her work is not done. After unpacking and participating in appropriate debriefings with colleagues, promptly pay all bills and write appropriate letters of thanks to all persons involved with the program. Study evaluation notes and written comments. And finally, write a summary memorandum incorporating participant and instructor reactions to the program with personal ones. This will be a valuable and useful tool for planning future programs.

For further reading

Anderson, Florence, et al, *Conferences That Work* (Washington: Adult Education Association, 1956).
Practical little volume that is part of a series of pamphlets issued by the Adult Education Association, 810 18th Street, N.W., Washington, D.C., 20006. Other titles include:

*Tested Techniques for Teachers of Adults;
When You're Teaching Adults;* and *How
Adults Can Learn More Faster.*

Butler, F. Coit, *Instructional Systems Develop-
ment for Vocational and Technical Training*
(Englewood Cliffs, N.J.: Educational Tech-
nology Publications, 1972).
Deals with "kinds" of learning and factors
that affect learning. Includes sections on
learning objectives, selection of instructional
media, and how to work with speakers and
instructors.

*Conferences That Work (Leadership Pamphlet
#11)* (Washington, D.C.: Adult Education
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Technical Leaflet

Site Analysis for Tourism Potential

by Linn Keller

To get the greatest benefit from this form, it is suggested that you first read and think about the questions. Then, accurately fill in your answers, considering the responses as contributing to an overall summary of the site's tourism potential. Each segment of this form yields specific information to assist in analyzing that component and to indicate support of the site's mission statement, as should all brochures, activities, or promotions, forming a positive, but accurate, picture.

Site Accessibility determines the amount of signage needed to let people know who or what you are and where to find you. This information also will assist in determining the kind of map necessary for any promotional literature.

Site Appearance and Facilities are what constitute the visitors' "first impressions," including on-site conveniences/constraints. Answers to these questions should be given objectively and from a visitor's viewpoint, carefully including negative as well as positive points.

Site Security/Safety Procedures are paramount to the security of the site and its collection as well as to visitors on the property. The better known the site and collection are, the greater their potential as targets for thieves. Analysis of potential problem areas should occur before an emergency occurs.

Site Operation pertains to the establishment of regular hours. Altering hours demonstrates flexibility of operation that could benefit the site's future growth.

Linn Keller, the former director of Kent Plantation in Alexandria, Louisiana, now is the director of Chinqua-Penn Plantation located in Reidsville, North Carolina.

Museum Shop, a potential moneymaker, must be managed carefully, paying attention to tax status, conflicts with state or local laws, and using realistic buying to support the efforts and overall message of the site.

Tours are important because they permit more visitors to interact with the site. It is also important that they give the message the site wants communicated about itself. This complex issue involves both people and expenses and determines whether changes in the site or its structure(s) are required to increase visitation.

Marketing Plan/Strategy, made realistically, with goals, methods of evaluation, and sensible time frames for achievement are critical to increasing public awareness of the site. Measurable, consistent change in marketing in under a year is unlikely, with three to five years probable for motorcoach activities.

Staff and Funding expenditures demand constant resources. It is important to decide realistically how much can be afforded before any commitment to staff or funding. Prioritizing also assists if needs to cut back arise.

Group Services are extremely important to the ongoing visitation of the site. Any "no" answer in this group should be closely examined, for a site should never promise what can not be delivered.

Co-operative Ventures yield benefits for all. Not everyone benefits equally all the time, but over time the cost is less and the benefits greater. Additional indirect benefits accrue to participants with professional interaction and training.

Site Assessment should include staff assessments compared with visitors' lists. Differences should be analyzed and validated. The positive, best, and most interesting points should be highlighted in site literature and releases along with a summary of the site's collection; the negative should be identified for change or elimination.

Site Accessibility

Site Name: _____

Site Address: _____

Site Location: _____ urban _____ suburban
_____ rural _____ other.

Distance from nearest interstate highway? _____.
Estimated driving time to site? _____.
Easy directions to site? _____ yes _____ no.
Good roads? _____ yes _____ no;
_____ 2-lane _____ 4-lane.
Highway signs? _____ yes _____ no.

Distance from nearest state highway? _____.
Estimated driving time to site? _____.
Easy directions to site? _____ yes _____ no.
Good roads? _____ yes _____ no;
_____ 2-lane _____ 4-lane.
Highway signs? _____ yes _____ no.

Distance from closest city? _____.
Estimated driving time to site? _____.
Easy directions to site? _____ yes _____ no.
Good roads? _____ yes _____ no;
_____ 2-lane _____ 4-lane.
Highway signs? _____ yes _____ no.

Distance from closest town? _____.
Estimated driving time to site? _____.
Easy directions to site? _____ yes _____ no.
Good roads? _____ yes _____ no;
_____ 2-lane _____ 4-lane.
Highway signs? _____ yes _____ no.

Distance from closest other attraction? _____.
Estimated driving time to site? _____.
Easy directions to site? _____ yes _____ no.
Good roads? _____ yes _____ no;
_____ 2-lane _____ 4-lane.
Highway signs? _____ yes _____ no.

Type of attraction?
_____ history museum
_____ art museum
_____ science/nature
_____ children's/hands on
_____ amusement park
_____ sports stadium/complex.

Do they advertise? _____ yes _____ no
_____ don't know.
If yes, _____ multimedia _____ TV
_____ print _____ radio _____ other.

Does the site's staff know the administrative/decision maker(s) at each attraction?
_____ yes _____ no.

Do they know the administrative/decision maker(s) at this site? _____ yes _____ no.

Have the staffs visited each other "professionally"?
_____ yes _____ no.

Have the staffs worked together on a joint promotion?
_____ yes _____ no.

Site Appearance and Facilities

Describe the site's surroundings:

_____
_____
_____
_____
_____
_____
_____
_____

Describe the parking area, including shape, flatness, surface materials, relation to site, visibility from road, handicapped area, approximate size/number of cars, number of buses, obstructions, etc.:

_____
_____
_____
_____
_____
_____
_____
_____
_____

Describe the physical layout of the property, including size, nature of grounds, access to visitor, outbuildings and their access, paths, gardens, hazards, security, guides, etc.:

_____
_____
_____
_____
_____
_____
_____
_____
_____

Describe physical layout of the facility, where objects are displayed/interpreted and including number of floors, rooms, levels, stairs, elevator, etc.:

_____
_____
_____
_____
_____
_____
_____
_____

Site Security/Safety Procedures

Does the site have a security system?
_____ yes _____ no.

Is the site fenced? _____ yes _____ no;
_____ ornamental _____ security.

Is the site patrolled? _____ yes _____ no.
If yes, is the site patrolled 24 hours/day?
_____ yes _____ no.

Live-in? _____ yes _____ no.
Contracted? _____ yes _____ no.
Staff? _____ yes _____ no.
Time clocks? _____ yes _____ no.
Dogs? _____ yes _____ no.

Mechanicals? _____ yes _____ no.
Monitored? _____ yes _____ no.
24 hours/day? _____ yes _____ no.
Passive? _____ yes _____ no.
Interior? _____ yes _____ no.
Exterior? _____ yes _____ no.
Silent alarm? _____ yes _____ no.
Fire alarm/smoke detector? _____ yes _____ no.
Current/updated call list? _____ yes _____ no.

Is there currently a relationship with local law
enforcement forces? _____ yes _____ no.
With the local fire department?
_____ yes _____ no.
With the local emergency medical department?
_____ yes _____ no.

Are these existing relationships good?
_____ yes _____ no.

If any existing relationship is less than good, is work
underway to improve the situation?
_____ yes _____ no.

Site Operation

Are the site's hours of operation regular?
_____ yes _____ no.

Is the site open daily? _____ yes _____ no.

What are the hours of operation for each day:
_____ Mon. _____ Tues.
_____ Wed. _____ Thurs.
_____ Fri. _____ Sat.
_____ Sun.

Is the site's administration willing to open the
facilities other hours? _____ yes _____ no.

Can the site be open other hours?
_____ yes _____ no.

Is grounds lighting available for evening hours?
_____ yes _____ no.

Is grounds lighting adequate for evening hours?
_____ yes _____ no.

Other operation features not otherwise noted: _____

Museum Shop

Do you have a museum shop?
_____ yes _____ no.

If yes, is there a demonstrated relationship between
shop items and the museum?
_____ yes _____ no.

Can the museum shop truthfully be called a "gift
shop"? _____ yes _____ no.

Is the site's administration aware of UBIT (Unrelated
Business Income Tax)?
_____ yes _____ no.

If yes, did UBIT influence item selections?
_____ yes _____ no.

Does the museum shop pay for itself?
_____ yes _____ no.

Tours

Does the site have guided tours?
_____ yes _____ no.

Self-guided tours? _____ yes _____ no.

Are both types of tours available?
_____ yes _____ no.
Guided only? _____ yes _____ no.
Self-guided only? _____ yes _____ no.

Does the site have paid guides?
_____ yes _____ no.

Are volunteers available to assist with tours?
_____ yes _____ no.
Volunteers only? _____ yes _____ no.
In addition to paid guides? _____ yes _____ no.
Available to tour buildings and objects only?
_____ yes _____ no.
Available to tour grounds only?
_____ yes _____ no.
Available to tour both? _____ yes _____ no.

Is there an existing volunteer program?
_____ yes _____ no.
If yes, is there a designated coordinator for the
volunteer program? _____ yes _____ no.
If no, is a formal volunteer program being considered?
_____ yes _____ no.

Is the site a member of any tourism organization(s)?
_____ yes _____ no.

Do any staff members attend tourism functions?
_____ yes _____ no.
If yes, do they receive registration?
_____ yes _____ no.
Lodging? _____ yes _____ no.
Meals? _____ yes _____ no.
Mileage? _____ yes _____ no.

Do any staff members participate in FAM tours?
_____ yes _____ no.

If yes, who? _____

Marketing Plan/Strategy

Does a marketing strategy exist?
_____ yes _____ no.

Who determines marketing strategy? _____

How is it determined? _____
_____
_____
_____

What market segments can be pursued? _____
_____
_____
_____
_____

Who determines where advertising/promotion funds
would be spent? _____
_____

How would success of a promotion be determined?
_____ increased inquiries
_____ increased visitation
_____ increased gate receipts
_____ increased shop receipts
_____ other (specify) _____

When/how frequently would comparison/
analysis occur?
_____ daily   _____ weekly
_____ monthly   _____ 6 months
_____ annually
_____ other (specify) _____

Time frame anticipated for results?
_____ immediate   _____ 0-3 months
_____ 3-6 months   _____ 6-12 months
_____ 1-2 years   _____ 2-3 years
_____ other (specify) _____

Staff and Funding

How many staff hours per week are available for site
promotion? _____

What staff members are available to work on tourism
promotions? _____
_____
_____
_____

Are these staff personable? _____ yes _____ no.
Skilled? _____ yes _____ no.
If no, are they willing to learn new skills?
_____ yes _____ no.
Is there someone available to teach these new skills?
_____ yes _____ no.

Is there money available for film and developing?
_____ yes _____ no.
Brochure design? _____ yes _____ no.
Printing? _____ yes _____ no.
Postage? _____ yes _____ no.

Is there money available for advertising?
_____ yes _____ no _____ maybe.

Costs of ad design and production in house?
_____ yes _____ no _____ maybe.

Costs of ad design and production outside?
_____ yes _____ no _____ maybe.

Where are advertisements placed?
_____ magazines   _____ newspapers
_____ radio   _____ TV
_____ billboards   _____ other.

Other information to be noted: _____
_____

Group Services

Can the site's parking lot handle increased traffic?
_____ yes _____ no.

Can the parking lot accommodate motorcoaches?
_____ yes _____ no.

Can the entrance/ticket area adequately handle more
people? _____ yes _____ no.

Can the current tour staff handle more people?
_____ yes _____ no.

Is the current tour staff willing to handle more
people? _____ yes _____ no.

Are more tour staff needed to handle any anticipated
increases in attendance? _____ yes _____ no.

Can the tour staff handle groups?
_____ yes _____ no.

Are current restroom facilities adequate to
accommodate more visitors? _____ yes _____ no.

Are other facilities appropriate for more visitors?
_____ yes _____ no.

Can the site's space safely accommodate more people?
_____ yes _____ no.

Can the building tolerate more people?
_____ yes _____ no.

Can the grounds support more visitors?
_____ yes _____ no.

Are other site staff willing to support more visitors?
_____ yes _____ no.

Is the security system adequate to handle more
visitors? _____ yes _____ no.

If ANY of the Group Services questions is answered with
a "no," is the site's administration willing to support the
work necessary to correct the situation?
_____ yes _____ no.

Cooperative Ventures

Are cooperative/collaborative promotional efforts being made with another site, institution, property, or group? _____ yes _____ no.

If no, why not? _____

_____

_____

_____

Is there a history of cooperative efforts?
_____ yes _____ no;
_____ on-going _____ one time.

Currently doing? _____ yes _____ no;
_____ on-going _____ first time.

Are cooperative efforts planned in future?
_____ yes _____ no.

If no, why not? _____

_____

_____

_____

Cooperative partner(s) include:

_____ other museum(s)/historic sites;

Public:
_____ CVB (local or associated)
_____ other local tourism-related office
_____ state office of tourism;

Private:
_____ other attraction(s)
_____ hotel/motel (local)
_____ hotel/motel (national chain)
_____ motorcoach
_____ campground
_____ other (specify) _____ ;

Group:
_____ formal/organized non-profit
_____ informal.

Active involvement from your site?
_____ yes _____ no.

Co-op grants? _____ yes _____ no.

Granting agency:
_____ public _____ private
_____ state _____ local.

Does staff write grants? _____ yes _____ no.

Partner write grants? _____ yes _____ no.
Dollars? _____ yes _____ no.
In-kind? _____ yes _____ no.

Rate the institution's cooperative ventures:
_____ very successful
_____ successful
_____ moderately successful
_____ not very successful
_____ unable to rate.

Are cooperative efforts evaluated when completed?
_____ yes _____ no.
By partner? _____ yes _____ no.
Joint evaluation with partner?
_____ yes _____ no.
Individual evaluation without partner?
_____ yes _____ no.
Shared with partner? _____ yes _____ no.

What is the purpose of doing tourism?
_____ more visitors
_____ more money
_____ for operations
_____ for projects
_____ increased reputation
_____ increased community/area visibility
_____ economic development for
            community/area/region
_____ other (specify) _____ .

Site Assessment

Using a professional point of view, list the five specific significantly positive items about the site, including any aspect of the property from structure to component of collection, feature of grounds, or personnel:

_____

_____

_____

_____

_____

_____

_____

_____

Using a professional point of view, list the five significantly negative aspects of the site:

_____

_____

_____

_____

_____

_____

_____

_____

_____

Using a visitor's point of view, list the site's five best and worst qualities:

Best: _____

_____

_____

_____

_____

_____

_____

_____

_____

_____

Worst: _____

_____

_____

_____

_____

_____

_____

How were these determined? _____

_____

_____

_____

Are there plans to correct the negative qualities?

_____

_____

_____

Are the positive qualities being utilized to their fullest potential? _____

_____

_____

_____

_____

Summary/Additional Site Information: _____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

Describe your collection, including approximate number of pieces, geographic area(s) reflected, time period(s), overall themes, scope of collection (area, regional, international, etc.), type(s) of item (furniture, textiles, decorative art, folk art, etc.), and significance of collection: _____

_____

_____

_____

_____

_____

_____

_____

Summarize the nature, scope, and depth of the collection described above: _____

_____

_____

What do visitors recognize as the two most interesting pieces in the collection? _____

_____

_____

Are these pieces readily accessible?
_____ yes _____ no.

Are they pointed out during tours?
_____ yes _____ no _____ generally.

Fancy Fonts, Borders, and Boxes: Ten Tips to Better Newsletter Design

BY REBECCA JACOBSEN HAGEN

Many historical organizations produce some sort of newsletter, be it monthly, quarterly, or bi-annually. If your organization is small or mid-size, your newsletter may be your only publication. Naturally, you want to get the most out of it.

The best newsletters are those that beg to be picked up and read. Their headlines jump from the page, their stories flow easily from page to page, their illustrations and photographs do not detract from, but enhance their stories. Such newsletters not only reflect well on the producing organization, they do a better job of getting information across to membership.

With advances in personal computers and the plethora of software for word processing, newsletters can be produced with ease, and with greater sophistication than ever before. However, producing an effective newsletter takes more than the use of the fancy borders, boxes, bells, and whistles available with most software packages. If you understand some basic do's and don'ts of newsletter design, and exercise these in conjunction with the right software features, you can create an inviting, reader-friendly publication. The suggestions in this leaflet will get you moving toward better newsletter design.

A WORD ABOUT DESKTOP PUBLISHING SOFTWARE.

Thinking about purchasing desktop publishing software? You might want to think twice. While such software includes features that make newsletter construction easier, it has one drawback: it is very expensive. Unless you are planning to produce a bi-monthly, twelve page, full-color glossy spread, special software is not needed to produce an effective newsletter. Most basic word processing programs include some desktop publishing features, which are more than enough for you to put together a simple, professional-looking publication.

PLANNING, PLANNING, PLANNING.

Putting together a newsletter is easy; putting together an effective, readable newsletter requires some thought and planning. Before you start a newsletter, or rework an old one, you should think about a number of issues. ● Who is the intended audience and what are their needs and interests? ● What is the purpose of the newsletter? ● Will it be a public relations tool? ● A slate for advertising? ● Will it entertain, or educate? The answers to these questions will help determine the overall tone and content of your newsletter. For example, the look and content of an educational newsletter for investment bankers will probably look much different from the informal newsletter for the local garden club.

If you are re-thinking an existing newsletter, ask yourself the same questions, and also ask, "is this newsletter doing what it is supposed to be doing?" If you do not know the answer to this question, you should do some research and find out. Then you can move forward and plan your refinements.

Once you know what you would like to do with your

Sample banners. Font choice should reflect the content and tone of your newsletter. Other elements, such as taglines, dates, and volume numbers should be worked in to balance with the title.

newsletter, you should think about what you can do. You may envision a twelve page, four-color glossy publication, but the financial reality may be closer to the single page, black and white, photocopy-it-in-the-office newsletter. How long will your newsletter be? What type of paper will you use? Can you afford more than the basic two-color newsletter?

Keep in mind that newsletter costs are not limited to the costs of the finished product. There are distribution costs to consider. Who will receive your newsletter and how will they receive it? Will you mail enough copies to utilize a bulk mailing permit? How often will you produce and distribute your newsletter? Will you distribute complimentary copies? To whom? When you start counting, you may find you need more newsletters than you think.

Your local print shop should be able to help you at this point. A printer should be able to give you a sense of how much it will cost to produce the type of newsletter you envision in different quantities. A good printer can also offer advice on how to get the look you want within your budget.

Once you have determined a theme and purpose for

Antique Bicycles Roll Into Historical Museum

by John V. Johnson

(illustration with placeholder text)

Oops! Lost a few lines. The placement of this illustration tricks the eye into thinking the top of column two is below, not above, the illustration. Your reader might miss the two sentences at top right.

your newsletter, and defined its physical parameters, you are ready to move to the next step: more planning.

MORE PLANNING.

You have a good idea of the tone and message you want to deliver with your newsletter. You have a general idea of what it will look like in terms of paper size and document length. You probably even have a good idea of the types of articles and features you would like to include within your pages. The next step is to start fine tuning the design of the package.

There are no limits to the number of ways your total newsletter package can appear. Further, each individual element from body text font to article heading alignment will contribute toward that look. Before you begin making your own detail choices, you should take a look at the

newsletters of other organizations. How have others made use of different column arrangements, graphics, and fonts? Do any of the banners catch your eye? Is it apparent what the other newsletters are about and who their intended audience is? If you see particular details you like, save the newsletter and put it in an idea file for later use.

Consistency is one of the characteristics of good newsletter design, and perhaps the best way to maintain overall consistency is to utilize a layout grid system. The simplest newsletters use a one or two column grid — that is, they have one or two columns per page. Three and four column grids are also used, though the more columns there are, the more complicated the layout will be. No matter what type of grid you choose, it is important that the same grid be used on every page. Professional designers often sketch out grid lines on scratch paper to assist in item placement.

In setting up your grid, you should think about how much space you want between columns, how large margins will be, and how headings will align with margins, articles, and columns. As you are sketching out various grid designs, do not forget your inner pages. It is very easy to get wrapped up in your cover design and forget that there are other pages to consider. The look you choose for your cover should carry through to the inner pages.

Searching for a different look for your newsletter? You might consider a different paper size or orientation. A larger size piece of paper folded in half makes a squarish document. How about larger paper folded newspaper style? By all means experiment, but keep your budget restraints in mind. Non-standard paper can add to overall production costs.

Finally, as you plan your design, you should give serious thought to your choice of fonts. You want people to read your newsletter, therefore you should pick out a readable font, especially for the body text. Different fonts have different "feels" from the whimsical to the modern and you should select a font that is consistent with the theme of your newsletter. Most computers come with a variety of fonts already loaded, however if you do not find

something you like, font packages can be purchased at software stores, or even downloaded off the Internet.

You should pick out one or two fonts and stick with them throughout your publication. As you are choosing, think about how each of your possible choices would look in all caps, in italics, in bold face, and in different sizes. Since you will be working with it a lot, you will want a font that looks good in a variety of styles.

Generally speaking, the font size for your body text should be somewhere in the 10 point range. Depending on the needs of your readership, however, you may wish to use a slightly larger font.

MAKING AN ENTRANCE.

Your banner is that thing, usually at the top of the cover page, that says, "Here I am. I am all about X. You want to read me!" At least, that is what a banner should do. A well designed banner has several elements: its various parts balance nicely, it fits within the layout of the page, and it boldly lets the reader know what the newsletter is about.

The title is typically the key element of a banner. Your title should clue the reader in to your theme and content, and one of the best ways to reinforce theme is through font choice. The only way to select the right font for your theme and title is to experiment. Remember, you want something fitting, but you want it to be readable.

A banner can also include a number of elements such as the date, a volume number, a logo, or a "tagline," a one sentence statement describing the publication's purpose or audience.

When pulling banner elements together you have two goals: the banner elements should work together as a unit, and the full banner should work within the underlying grid. Again, the best way to find out what works is to experiment. Start with your title—try it in different fonts and different sizes. Try centering the title at the top of the page, or justified right or left. Then try adding your other chosen elements. Where will your tagline go? Are there open places within the design to insert small items such as the date? Do elements in the banner line up with items in the underlying grid? How does the whole banner grouping relate to the underlying grid?

There are no limits to the ways you can combine and place banner elements. Do not be afraid to try different combinations until you find the one that feels right.

Creative use of text, such as drop caps (upper left corner) and pull quotes (upper right) can help visually break up long columns of text.

ANOTHER ATTENTION GRABBER.

Nothing draws the eye like a well selected, well placed photograph. Photographs should not be used just for the sake of using them, however. A photograph should complement a corresponding story, or offer a deeper, or different perspective. Unfortunately, not all photographs make good newsletter photographs. A blurry, poorly composed, or boring photograph will actually detract from the look of your newsletter.

What makes a good newsletter photograph? Generally speaking, black and white photographs reproduce better than color photographs, so you should use black and white if you can. A good photograph is a clear photograph. Fuzzy photographs lack detail and will lose even more detail when they are reproduced. A good photograph has high contrast and a wide range of tonal values.

Whites should be white, blacks should be black, and there should be several shades of gray in between. Action shots are more interesting than static head and shoulders shots, so depending on the content of the corresponding article, you should use action shots. Also, remember that you can crop a photograph to improve its composition.

Scanners and software will allow you to manipulate

places you specify. If you go this route and you are using photographs that are part of your collection, you should make sure that your printer understands the nature of the items he or she is working with. You do not want to suddenly find yourself with crop marks and other notations on your collections items.

If you prefer to do your own reproduction, or if you do not feel that you can afford the services of a printer, it is still a good idea to consult a printer regarding photo reproduction. Your printer can help you determine the best parameters for your scans, or suggest other reproduction options.

In addition to selecting photographs, you need to decide where to place photographs within the document. It is a good idea to keep the underlying grid in mind when you are placing photos. It is also a good idea to place photos consistently, rather than randomly, throughout your newsletter. Select a type of alignment, such as centered in a column, centered between columns, or hanging in the margin, and place your photographs throughout your document based on that alignment.

It is important to remember that the composition of a photograph gives it internal direction. In other words, the content of a photo may draw the eye one way or the other. You must be careful where you place a photograph with

Too much! The only thing holding this page together is its three column grid. Any message this newsletter might be trying to deliver gets lost in too many fonts and boxes.

scanned photographs to correct for things like poor contrast and tone. However, if you do not have a high resolution scanner and access to a quality laser printer, you might not be happy with the printed results of your scans. You should also be aware that altering images with computer software, or by cropping, may infringe on copyright. In fact, when placing any photograph in your newsletter, it would be wise to establish your right to do so.

The method that you choose to reproduce your photographs depends upon the final quality you want and your in-house production capabilities. Perhaps the best way to insure that your photographs will reprint in the best possible manner is to let a print shop do the reproduction for you. For a fee (usually per image), a print shop can scan in and place photographs for you in the

strong lines, as those lines become part of your document. You would not want to place a photograph where it would draw the reader's eye right off the page.

A poorly placed photograph can disrupt text. Be sure to leave enough white space around placed photographs to prevent confusion. Also, be careful not to place a photograph in such a way that it causes the reader to skip over a section of text.

WHAT IF I DON'T HAVE A PHOTO?

If the world was a perfect place, we would have a perfect photograph to accompany every article in our newsletters. Unfortunately, the world is not a perfect place. Fortunately, there are other newsletter illustrating options. Clip art, charts and graphs, and text art are all possible alternatives to photographs.

Clip art—pre-made graphic images—can be purchased on disk, CD ROM, in booklets, or downloaded from the Internet. Chances are, some clip art even came loaded on your computer. Depending on the formats that your software will support, clip art can be pasted right into your document and sized to suit your needs. Most clip art also has the advantage of being copyright free. It can be expensive to purchase CD ROMs of clip art, especially if you only use one or two of the images. Clip art books, which can be found at most book stores, are less expensive. These images can be scanned in, sized and placed or pasted on a document and copied. These images, too, tend to be copyright free.

Most word processing programs offer limited paint or draw features that allow you to create your own graphics. Even if you are no artist, the simple tools included with the programs let you draw perfect geometric shapes and lines. These same programs also offer table, chart, and graph options. If a chart or graph is appropriate to your article, you can add one by selecting a pre-made chart type (pie, bar, line) and plugging in your specific numbers and labels.

Another way to add visual interest to your document is through creative use of text. Creative use of text can be effective in breaking up long, uninterrupted columns. Can your article be broken into different sections? Try printing the subheadings for each section in a slightly larger, bolder, or italicized version of the body text font. Drop caps, those large single letters that begin an article or article section, are also effective in creating visual breaks in long columns. Most word processing programs come with built in functions that let you select, size, and place a drop cap with a few clicks of the mouse.

Another creative use of text is the "pull quote." A pull quote allows a section of text to act like a larger graphic. Pull quotes are small statements copied from the text, enlarged, and set within the text of an article. Body text "wraps" around the pull quote in the same way that it wraps around photographs. Such quotes break up columns, and let you emphasize important statements from your articles.

DON'T BE AFRAID OF WHITE SPACE.

In your zeal to design the perfect grid, place the right articles, and select the best possible illustrations, there is one design element that can easily be overlooked: the use of white space.

It is easy to think of white space as wasted space that could, or should be filled with another article

This cover could use a little help. The banner at top speaks in a whisper—it is the Volunteer headline that grabs the eye. The bottom paragraph seems thrown in. It looks as though it has been pulled over just to fill the large hole at page bottom.

or piece of clip art. It is better, however, to think of white space as a tool. Leaving the right amount of white space around a photograph, for example, will add emphasis to the photograph. White space makes an effective break between different articles and does not clutter the way borders, boxes, and rules can. It also offers the eye a nice visual break on what could otherwise be a text heavy page.

You may wish to consider actually planning white space into your grid. A nice example is the newsletter page that leaves a wide, blank margin or empty column on one side. The white space can be used to "hang" article titles or photographs. Even if you choose not to purposely incorporate white space into your grid, you should watch for instances where the best thing to put in that little blank space is nothing at all.

DO NOT GET CARRIED AWAY WITH YOUR TOYS.

Computers and word processing software offer a wide range of design options at the click of a mouse. If you really explore your software you will find that you have the ability to twist text into scrolls, place boxes around it, border it, fill it with pattern, and turn it on its head. With all

newsletter production easier, and will give you a more professional looking final product.

Because you are working with so many variables-body text fonts, title fonts, caption fonts, different paragraph indentation, etc.—it can be difficult to maintain consistency through a large document. Style functions are helpful in that once they are set, they remember such details for you.

For example, if all your titles were to be set in Times Roman, 36 points, and boldface, those parameters could be set up under the style function and given the name "title." Each time you came to type a new title in your newsletter, you would select the text, and click on Style: title. The selected text would be formatted as specified.

Master pages, or page templates, also allow you to pre-set certain parameters but at page level. You may choose to set up a template with your underlying grid/column lines in place. You may wish to set up a cover template with your banner already in place. In fact, any details that will be permanent features can be pre-set into a template. When it is time for a new issue, simply open a new template and insert your specific articles and illustrations.

Your software manual should show you where to find and how to use these features in your particular word processing program.

The use of typographers characters will give your

By increasing the banner font size and changing the box a bit, this banner suddenly finds a voice. When the volunteer article is aligned to the single column grid, there is more than enough space for another short article and a graphic. Consistent size and alignment of article titles pull the cover look together.

these available options, it can be very tempting to try them all out at once. You should resist this urge.

Excessive use of different fonts and boxes are two of the most common examples of getting carried away with your software. Too many fonts and boxes on a page make the page cluttered and confusing. The eye does not know where to focus on such a page as there is too much going on. Use fancy fonts and borders in moderation, sticking with one or two readable fonts. Use one or two boxes instead of five, or use white space to separate items.

TOYS YOU CAN (AND SHOULD) USE.

While you should use your box and border tools sparingly, there are other tools you should learn to use and use often. "Style" features, master page or template functions, and typesetting symbol keys will help make

publication a much more professional look. These characters can be found under "symbol" or "character" menu options in most word processing software programs. The following are some of the most common typesetting symbols and the keystrokes they replace:

Correct:	Incorrect:
"smart quotes"	"regular quotes"
— (em dash)	-- (hyphens)
– (en dash)	- (hyphen)
… (ellipsis)	. . . (periods)
italicized	underscored

PROOF IT!

You have taken all the right steps. You have an attractive layout and an exciting banner; you have selected appropriate fonts and photographs; your articles are

interesting and your typesetting looks professional. Everything seems to be in just the right place. Next, you need to check your work.

When we think of proofreading, we tend to think in terms of checking for typos. While checking for typos is certainly important, there are other aspects of your newsletter that should be proofed as well. In addition to checking your spelling, you should check the flow of your articles, the balance of elements on the pages, and the consistency of your details.

The best way to check the flow of your articles is to print a hard copy draft of all your pages and give them to someone to read. Ideally, your volunteer reader will not have been involved with the newsletter production. Ask the reader if she understands where the articles start and stop. Are there places where parts of text get skipped due to their placement? Do your chosen font size, column style, and line spacing make for easy to read text? If your volunteer reader expresses any difficulty, shift some elements to correct the problem.

Placing your draft newsletter pages side by side as they would appear in the finished product will allow you to proof your layout. How do blocks of text and photographs balance on each page? Are all elements properly aligned? Are each of the sections distinctly separate? Could more white space or a rule help to better separate items?

Finally, double check your details. Do all photographs have captions? Are all footers, headers, by-lines, page numbers, or other details in place and are they consistent? Have you updated volume numbers and dates? Did you follow up your spell check on the computer with a spell check by human eyes? Spell checkers are wonderful for catching spelling errors, but they are notoriously poor at catching grammar errors and properly spelled but incorrectly used words.

When you have made your adjustments, print it. And then, go back and do it again!

STILL NEED MORE?

Tried everything and still want something new for your newsletter? Consider adding color to your publication. Adding color may sound costly and complicated, but there are alternatives for adding color to your newsletter without adding great cost.

You might consider printing on a different color of paper, or in a different color ink. There are many colors and qualities of paper out there and just as many ink colors—just ask any printer. Be aware of the fact, though, that text and photographs are clearest when printed with black ink on white paper. If you choose to try a colored paper, select a light colored paper. If you choose a different color of ink, select a dark color such as navy blue or forest green. Be warned, though. Photographs can look a little strange when printed in colored ink.

Adding "spot color" is a popular way of adding color to a publication. While this is a more expensive option, it is still less expensive than many other color printing options. When you add spot color, you typically pick out specific elements, such as banner, article headings, and "bullets" or other graphics, that will print in a color of your choice. The rest of your document will be printed in standard black. Getting the two colors on the paper requires two separate runs of your paper through the press. The first run prints color elements. The second prints black elements. It is the additional ink color and the second run through the press that add cost to the spot color process.

If you have specific features in your newsletter that do not move or change with each issue, you might consider putting your spot color on those features. That way, your printer could print a large run of your paper with the colored elements, say a year's worth, all at once. This would allow you to have spot color printed on all of your issues, but only at the cost of one additional run of paper through the press.

You do not need to be a graphic designer or a computer genius to design an effective, attractive newsletter. With some careful thought and planning, some basic knowledge of design tricks, and a little help from your standard word processing software, you can build a newsletter that works for you.

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