

# **Identity Work in Portuguese Local Museums: Exploring Adult Engagement and Experiences**

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## **Abstract**

### **Identity Work in Portuguese Local Museums: Exploring Adult Engagement**

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This thesis aims primarily to understand the nature of adults' sustained experiences (notably cognitive, social, emotional and aesthetic) in their interaction with a particular Portuguese Local Museum, over a considerable period of time. Specifically, the thesis examines engagement, which two community-based museums have been fostering: the *Museu do Trabalho Michel Giacometti* and the *Núcleo Museológico de Alverca*.

A qualitative approach to research was employed, and in-depth interviews were conducted to explore adults' perceptions and reflections upon their sustained relationship with the museums. Narrative Inquiry-inspired methodologies enriched the data gathered from interviews.

Grounded in the research data, and attentive to the interviewees' biographical recounts and meaning making processes, we were able to propose that this thesis' participants engage in sustained relationships with a particular local museum as a strategy of identity building (Rounds 2006). We advance a possible interpretative taxonomy centred in three main categories: Learners, Cultured and Amateur Collectors.

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## List of Abbreviations

**APPCDM** – Associação Portuguesa de Pais e Amigos do Cidadão Deficiente Mental / Portuguese Association of Parents and Friends of the Mentally Disabled Citizen

**GAM** – Grupo para a Acessibilidade nos Museus / Group for Museum's accessibility

**IPM** – Instituto Português de Museus / Portuguese Museums Institute

**MINON** – International Movement for the New Museology

**MTMG** – Museu do Trabalho Michel Giacometti

**NMA** – Núcleo Museológico de Alverca

**RPM** – Rede Portuguesa de Museus / Portuguese Museum's Network

# Chapter One: Introduction

## 1.0. Preamble

In 2008, I had just concluded a second master's degree in Museum Studies (Universidade Lusófona de Humanidades e Tecnologias). I had returned to university a decade after graduating in History (Universidade Nova de Lisboa) in 1996, and I had become fascinated with the museological field. My master's dissertation had briefly looked at the learning provision some Portuguese Museums were offering, and it had invited museum educators to try out an adapted version of the General Learning Outcomes (GLOs) framework, from Museums Libraries and Archives (MLA), as a tool for the museums' self-assessment. That was how I came in contact with one of this thesis' case study museums, The Museu do Trabalho Michel Giacometti, and how I became aware of the singularity of Portuguese Local Museums within the Portuguese museological system. Looking at this museum's visitors, I was surprised by how diverse they were, chiefly distinct from the visitors I used to come across in the National Museums whose cultural background was not so different from my own. Here I saw ethnic communities taking the lead in conversations about their own identities. Here I saw disabled individuals celebrate their achievements, taking part in events, and performing for the general museum audiences. Here I saw older, working-class individuals, without an academic education, eagerly absorbing art curator's words in exhibition inaugurations. These were not the typical museum-goers as described by Bourdieu in his classical *The Love of Art*.

And a spark of curiosity had been ignited. I wanted to understand what was happening in these local museums and I wanted to focus on their adult visitors. That was when I decided to apply for the Distant



Learning PhD Programme at the School of Museum Studies, in the University of Leicester.

From the outset, I knew I wanted to look more closely at Portuguese Local Museums. But not from a historian's perspective. I did not want to engage in archival research digging up the roots of this local museology. I wanted to understand how these museums interacted with their visitors in the present. I wanted to examine why their communities were treasuring them. I wanted to witness and to make meaning of the unique encounter between individuals and meaningful things displayed in a familiar setting. In the beginning, I was mainly framing these encounters in terms of more generic *learning experiences*, however, soon, it became something more.

### **Voice**

A note on the academic voice adopted in the subsequent sections of this thesis should be stated here. Following this preamble, the thesis employs a distant voice and uses 'we' consistently. The term 'we' was a subject of considerable discussion with my supervisors and the decision to keep this particular distant tone in the thesis is largely the result of translating from Portuguese, and gradually, over the seven years of PhD research coming to my own academic voice. It also reflects, to a degree, the coming to voice of my Portuguese research participants as will presently become apparent.

### **1.1. Research statement and research problem**

This thesis is looking at adults' sustained experiences in their interaction with a particular Portuguese Local Museum. It aims to understand the nature of those experiences and to examine engagement, which two community-based museums have been fostering: the *Museu do Trabalho Michel Giacometti* and the *Núcleo*

*Museológico de Alverca*. These museums are the case study sites where the thesis's research questions were explored.

This thesis research objectives are:

Firstly, to explore the nature of adult's sustained museum experiences (cognitive, social, aesthetic, etc.) and engagement in two Portuguese Local Museums, selected as case studies.

Secondly, to find out how and why those experiences are relevant to their lives as individuals, but also as community members.

Thirdly, to understand in what ways the museum narratives are acknowledged in the individual's own biographical narratives.

These research objectives translated into the following **research questions**:

Firstly, what is the nature of the experiences and engagement adults gain as a result of their sustained relationship with a particular community-based museum?

Secondly, how and why those museum experiences are relevant to their lives, and, in a broader scope, to their community?

Thirdly, how are those museum experiences narrated within their larger biographical accounts?

### **Research justification**

Museum visitor studies in Portugal have traditionally been an underwhelming endeavour. The first visitor study was performed by the *Museum da Ciência da Universidade de Lisboa* in the 1990s (unpublished) and the first official and comprehensive analysis of the

visitors to Portuguese National Museums, which was undertaken as recently as 2015,<sup>2</sup> is still to be published. In between those dates, there were segmented studies looking at visitors in Art Museums (Simplicio 2010; Santana 2010) and at locally clustered museums (Santos & Neves 2005). These studies are eminently sociological, using statistical frameworks and general visitor profiling.

Concurrently, the initial investigation regarding adult and older adult visitors in Portuguese Museums dates from the beginning of the 2000s and draws on contributions from Duarte (2000), Pestana (2006) and Camacho (2006). These Portuguese researchers had looked at the, at the time, recent shift in the learning provision for adults offered by the Portuguese Museums and reported in European publications such as *Collect & Share* and *Museums and Adults Learning – Perspectives from Europe* (NIACE). Finally, in 2012 a more comprehensive study was published looking at senior visitors: *Museums and Senior People in Portugal*. Its aims were manifold. First, ‘to evaluate the relationship of the senior population (visitor and non-visitor) with museums’; secondly, ‘to conduct a diagnosis of the current panorama of museums in the relationship with the senior population’, thirdly, ‘to evaluate the relationship of museums with senior visitors’, and finally, ‘to make recommendations to improve the accessibility of Portuguese museums regarding the senior population’ (Teixeira, Faria & Vlachou 2012: 7-8 [originally in English])

*Museums and Senior People in Portugal* used both quantitative and qualitative methods (focus groups) for data gathering and its conclusions, again, pointed to sociological trends regarding senior citizen’s cultural habits. The authors observe the senior citizens are more numerous, more educated and are increasingly preferring an ‘active retirement’ (Teixeira, Faria & Vlachou 2012: 100). They also

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<sup>2</sup> <http://www.portugal.gov.pt/pt/ministerios/mc/noticias/20160516-mc-publicos-museus.aspx>

point to the fact that Portuguese museums are increasingly augmenting their senior-focused programmes and making the necessary arrangements for provision to be physically inclusive for this population, although it is still insufficient (Teixeira, Faria & Vlachou 2012).

What these generic studies have yet to address is the in-depth analysis of the individual's connection to a specific museum, the nature of their museum experiences, and their motivations for persistent active engagement with a museological institution. And it is this gap in the literature that has been the inspiration and research path for this thesis. Additionally, the thesis has chosen to investigate those sustained relationships between adult visitors and a certain type of museum: local or municipal museums, which, as we will demonstrate in the following chapters, have distinct features within the Portuguese museological system.

### **Research journey**

As stated in this chapter's preamble, the idea of looking into the particular aspects of the Portuguese local museology first arose during our master's dissertation. Being particularly interested in museum learning and in the educational provision Portuguese museums were offering to their different audiences, we decided to investigate distinct museum typologies selecting three case studies: 1) an university museum, *Museu de História Natural (Natural History Museum)*; 2) a national museum with central administration by the Portuguese Museums Institute (IPM), *Casa Museu Anastácio Gonçalves*; 3) and one local museum, *Museu do Trabalho Michel Giacometti*, governed by the municipality of Setúbal. At that time, we had become knowledgeable of the English General Learning Outcomes (GLOs) framework, from Museums Libraries and Archives (MLA), as a tool for the museums' self-assessment and we were interested to partially test its usefulness in the Portuguese museological context.

Focusing our master's fieldwork in the self-assessment of these museums provision, we worked with its educational teams during several months, gaining an in depth understanding of their educational processes and priorities. During that work, we immediately recognised the distinctiveness of the work done in the municipality managed *Museu do Trabalho Michel Giacometti*, sensing a deep engagement with its communities and an unusual effort to foster to the city's distinct audiences. At that time, the research we undertook could not precisely consubstantiate the impacts these efforts were having in the museum's users, but it sparked a vivid curiosity to look closer. Were there particular features that enable local museums to establish more sustained connections with its communities? Were other Portuguese local museums doing similar efforts to recognise and provide meaningful experiences to their particular audiences? Was there a distinct role or function for the Local Museology? These were some of our initial questions.

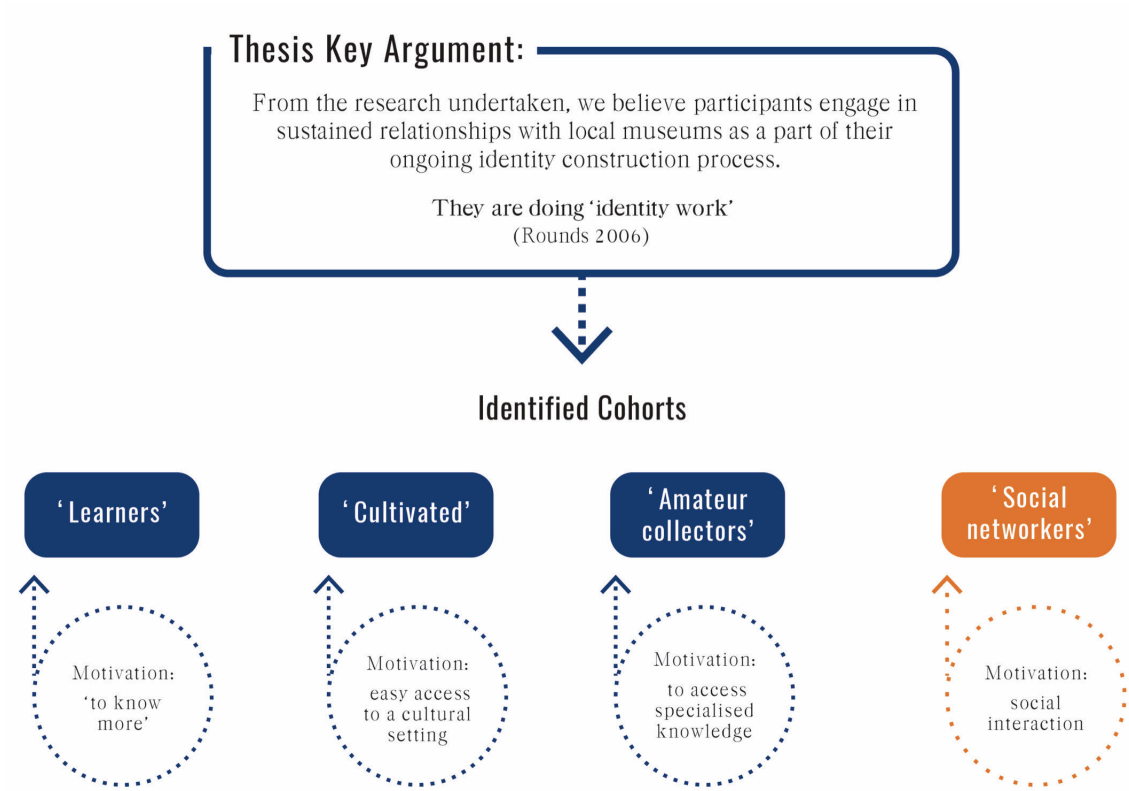
As stated previously in this chapter, there was, and arguably still, is a deficit of research into visitor's experiences in Portuguese museums, this deficit is even deeper in what concerns adult audiences. So, from the outset of our thesis, we were set to investigate the experiences adults have in museums, more specifically in Portuguese local museums. In the beginning, we framed those experiences in terms learning experiences (albeit in a very broad sense), but throughout the research journey, the notion of 'museum experience' became to be framed in a more comprehensive way, as we will later explore. Thus, having generally framed our research objective in terms of unravelling the nature of adult's museum experiences in Portuguese local museums we set out to select our case studies.

Initially, as all novice researchers, we had grandiose goals. We had imagined doing field work in ten Local Museums. This idea was quickly and very intelligently dismissed by our experienced supervisor. As

looking into ten museums for a doctoral thesis would never allow for the in-depth research we should aim for. The number of case studies was then drastically reduced to two, providing us with a sensible and delimited ground of research. The selection of the two case studies, as we will detail later in this thesis, was done through a process of inquiry, contacting the totality of the Portuguese Local Museums, gaining an understanding of their specific provision for adult audiences, and inquiring whereas to their willingness to participate in our research project. The response to our inquiry confirm *Museu do Trabalho Michel Giacometti* as a fruitful research ground, as we will later detail, and also revealed the potential of a second case study, the *Núcleo Museológico de Alverca*, not only as an enthusiast partner in the research we were about to embark, but also as an institution deeply aware of its surrounding communities.

Having recognised the work these museums undertake to maintain sustained relationships with its adult audiences, our research was keen to understand the **nature of the experiences and engagement adults gain as a result of their sustained relationship** with these two particular museums. But also, **how and why those museum experiences are relevant to these individuals lives**, and, in a broader scope, to their communities. Later in the process of the research, and looking deeply into the methodological approaches which could enhance our understanding of our subject, we **recognised that the way those museum experiences were narrated within the larger biographical accounts of these individuals** would provide an essential context for our interpretation efforts.

As we will explain in detail over the following chapters, particularly in Chapters Five and Six, the nature of these museum experiences came to be interpreted under the broad idea of **identity building**, as framed by Rounds (2006). A brief overview of this thesis key argument can be found in the following chart:



**Figure 1 - Introduction to the Key Argument of the Thesis.**

### **The distinctiveness of the selected case studies**

Our first case study museum, *Museu do Trabalho Michel Giacometti*<sup>3</sup>, has been recognised within the Portuguese academic literature and by its peers as an outstanding example of good museological practices with its communities. It is frequently given as a case to be emulated during museum practitioners' Conferences and reunions<sup>4</sup>. Since 1995, the date of its definite inauguration, the museum has been working in straight connection with its surrounding communities, developing efforts to become acquainted with its surrounding neighbourhoods (Project 'Olá, Vizinho!' / 'Hey, Neighbour!'); to foster museological provision to an increasingly diverse community, recognising the city's traditional communities (historically, a town of fishermen and intellectuals), but also to the new and variegated communities brought by migrant economic trends which made of Setúbal a multicultural city (Project 'Tardes Interculturais' / 'Intercultural Afternoons'<sup>5</sup>).

Our second case study, the *Núcleo Museológico de Alverca*, is arguably a less documented and recognised case in the Portuguese museological field, although its museological project and practices were set out by an eminent museum practitioner, Clara Camacho, to whom we will refer later in this thesis. It is a considerably smaller museum in comparison with the previous case study, as it is an extension of a larger local museum, *Museu de Vila Franca de Xira*. However, its museological practices have moved from the traditional object-centred approach found in the latter. As we came to recognise throughout this research project, The *Núcleo Museológico de Alverca* is deeply committed to work alongside with, and in benefit of, their surrounding communities striving to establish a deep and personal engagement with every individual that approaches the museum. These people are seen not only

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<sup>3</sup> These two case studies will be presented analysed in detail in Chapter Four, and Chapter Six.

<sup>4</sup> vide Clara Camacho and Hugues de Varine, unpublished papers presented in Lisbon, March 29<sup>th</sup> 2010, during the VIII ICOM-Portugal Annual Journeys, under the theme *Museums and Social Harmony*.

<sup>5</sup> We will later in this thesis look in detail at this particular project.



as the museum audiences but mainly as the museum resources. The people to whom the museum not only caters to but depends upon, in order to develop museological programmes that are significant to the museum's specific communities. Later in this thesis, we will illustrate this argument with relevant research data.

We cannot, based on our research, extent this thesis' findings to other local museums in Portugal. However, we believe that these two case studies have distinctive features that set them apart, for instance, being fundamentally audience-oriented, or permanently striving to include new and diverse communities (e.g. focusing on the non-visitors, and designing strategies to bring them to the museum), making them exemplary cases in the Portuguese museology. Concurrently, the type of research published regarding other municipality ran museums is, to the best of our knowledge, exclusively monographic, not providing grounds for comparison. As for a wider international context, we believe that these museum's work falls under the categories the New Museology and to some extent the Eco-museums movement, albeit those categories cannot be interpreted as historically crystallised models, but as evolving typologies. We will return to this subject over Chapter Three, but it is clear that parallels can be drawn with museums influenced by the 1970s Movement for New Museology (MINON), in Brazil, Latin America, Canada, India<sup>6</sup>, etc.

As for a European parallel, the work these two museums do resonates with the words of the Swedish museum practitioner, Helena Friman:

(...) the museum's main task and arena is the city itself; that a local museum must take part in the never-ending discussion about changes to the built environment and the social life of the city, not just by collecting and reflecting objects and actions, but also through the exchange of ideas, communication and confrontation. The museum is

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<sup>6</sup> Vide Dutta (2010), Mayrand (1986), Santos (2002)

there to make the citizens interested in and curious about the world outside. (Friman 2000: 22)

Regarding the additional cultural and convivial opportunities of the two locations featured in this thesis, either the city of Setúbal or the surrounding area of Alverca, offer other prospects for adults to develop their social and intellectual needs. In Setúbal, in the inner-city area, there are six other museums, a library network with five different locations throughout the district, a Senior University<sup>7</sup>, a Theatre (*Teatro Luísa Todi*), and a Cultural House (*Casa da Cultura*). Conscious of an aging community, the municipality of Setúbal develops several activities for the elderly, such as the ‘Celebration of the Elderly Person’<sup>8</sup>.

As for the area of Alverca, there is only one museum in the village, but there are ten additional museums in the Vila Franca de Xira council<sup>9</sup>, to which Alverca belongs. The council also has a library network with six venues throughout the city’s limits, and a mobile unit<sup>10</sup>. The municipality also has a Senior University<sup>11</sup>. However, for the residents of the village of Alverca all this additional cultural equipment is outside the village and imply having a means of transportation.

As regards to the contextualization of these two case studies within the chronology of the development of museums in Portugal after the Democratic Revolution of 1974, which we will explore in detail in Chapter Three, we can place the initiative for the establishment of the *Museu do Trabalho Michel Giacometti* within the first moment of the ‘early days of Democracy’ (1974-1990). Although its final inauguration only happened in 1995, the ethnographic section of the museum’s collection was amassed immediately after the 1974s Revolution and the

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<sup>7</sup> <https://uniseti.wordpress.com>

<sup>8</sup> <http://www.mun-setubal.pt/pt/pagina/equipamentos-culturais/68>

<sup>9</sup> <https://www.cm-vfxira.pt/pages/1007>

<sup>10</sup> <http://bmvfx.cm-vfxira.pt>

<sup>11</sup> <https://www.cm-vfxira.pt/pages/398>

launching of this museological project happened in the 1980s. Additionally, we can identify the basic fundamentals of New Museology, which as we will see watermarked the period, not only in the individuals who led the establishment of the museum, many of them active members of the MINON in Portugal, but in the ‘social function’ the museum envisioned to achieve (Moutinho 1993).

As for our second case study, *Núcleo Museológico de Alverca*, we can generally place it within the second period of the established chronology. Which we have classified as the bureaucratic reorganization of the Portuguese museumscape, between the years of the 1990s and the 2000s. This museological pole was initially and precariously established in 1990, however, it went through extensive renovations in the beginning of the new century, finally reopening in 2007. The recognition that its initial venue lacked major components essential to be classified as a modern institution which met the classification criteria of the Portuguese Museums Network. The renovations offered to opportunity to establish an auditorium, learning rooms and temporary exhibition rooms, giving its collections a new curatorial look and a modern museographic language. In this sense, the 2007s reopening can be understood within the third moment of the presented chronology, from the year 2000 to 2013, with the call and implementation of new and more rigorous standards for the sector.

Finally, another aspect that contributes for the distinctiveness of both of this thesis’s case studies is the relevance of Paulo Freire’s influence in some sectors of the Portuguese museological field, specifically among those who embraced the 1980s ICOM group, MINON. In the case of *Museu do Trabalho Michel Giacometti*, its Director of more than 10 years, Isabel Victor, is a member of the Portuguese section of MINON. As for the *Núcleo Museológico de Alverca*, although its contemporary Director is not a member of MINON, she had worked in straight connection with the previous Director, Clara Camacho, who is a

founding member of the Portuguese section of MINON. The paramount influence of Freire to New Museology is underscored by several, particularly by the Brazilian museologist Maria Célia Santos (2002). Concurrently, Freire's contributions to the field of Education and Philosophy gave this thesis one of its key theoretical contributions, as we will explain in detail on Chapter Two, but that we will now briefly enunciate.

## **1.2. Key theoretical contributions to this thesis**

This thesis title can provide a framework to outline the key theoretical contributions that have underpinned this research. The thesis title, simultaneously, addresses the larger academic debate in relation to which the research findings should be understood.

*Identity Work in Portuguese Local Museums: Exploring Adult Engagement and Experiences.* This title combines several complex concepts that cannot be absolutely defined or crystallised. They appear in the museological debate as explanatory categories which have been serving the construction of a body of knowledge regarding the relevance of the Museum in people's lives.

'Identity Work' is a concept firstly framed in the museological debate by Jay Rounds (2006). Rounds wanted to convey 'the process through which we construct, maintain, and adapt our sense of personal identity, and persuade other people to believe in that identity' (Rounds 2006: 133). This concept became of paramount importance in the reading of our research findings as will be explained in Chapter five. In short identity work points to a process of personal transformation in which museums can play a valid role. The transformative potential of museums has been addressed by Barbara Soren (2009) and her views on sustained personal transformation as a result of museum

engagement have served as an important conceptual basis for this thesis. Falk's identity categories framing motivation for museum visits (2009) are also addressed and have served as a theoretical backdrop to this thesis's findings.

The specificities of the 'Portuguese local museums' within the larger Portuguese museological system are addressed in chapter Three and are discussed using Pimentel's (2005) and Anico's (2008) contributions to the subject. Primo's (2006) evaluation of the specificity of Portuguese local museums is also acknowledged.

The complex issue of 'museum experiences' is initially outlined in this thesis using Falk & Dierking (1992) and Falk's (2009) framework regarding visitors experiences in museums with its tripartite stratum of interacting contexts: the personal, the physical and the social-cultural. This thesis also acknowledges Pekarik, Doering & Karns's taxonomy (1999) regarding museum experiences. A paramount sub-theme within the scope of museum experiences, and one that is featured greatly in this thesis, is the issue of museum learning experiences. The thesis gained its main theoretical perspective regarding this matter from the contributions of Roberts (1997), Hein (1998; 2006), and Falk & Dierking (2000).

Museum learning experiences are, additionally, discussed in relation to the debate concerning the learning sciences. In addition to the texts cited above contemporary theories of learning are addressed focusing on the current views regarding constructivism (Glaserfeld 2005; Fosnot & Perry 2005), critical pedagogy (Freire [1970] 2000, Giroux 2010), transformative learning (Mezirow 1991; Dirkx, 1998), and adult learning (Usher, Bryant & Johnston 1997; Illeris 2009; Jarvis 2009).

Critical Pedagogy, as first envisioned by the radical Brazilian educator Paulo Freire, has given this thesis part of its epistemological structure.

We assume the Freirean principle that learning can be radically transformative as it is, simultaneously, a call to think critically about the individuals internal and external constraints and to act accordingly in order to achieve her or his empowerment. Thus, being simultaneously intellectual construction and social agency, the concept of ‘conscientization’<sup>12</sup> can help social researchers in general, and museum researchers, in particular, to frame issues like cultural participation, social justice in museums, accessibility, etc. as we will strive to demonstrate in the following chapters.

Finally, the concept of engagement, namely of ‘sustained engagement’ is framed in this thesis based on Everett & Barrett’s research (2009). This term stands for visitors’ deep and prolonged engagement with a specific museum, over a significant period of time and it was of paramount importance in the delimitation of this thesis’s analytical scope.

### **1.3. Thesis methodological overview**

This thesis uses a qualitative methodological approach at the case study museums, based on Narrative Inquiry-inspired interviews with 20 participants. It made used of data gathered from in-depth, open ended interviews and grounded theory informed analysis and interpretation of the research findings.

The research falls under the Qualitative Studies taxonomy. It looks at specific cultural and social phenomena with the intent to describe them and to gain understanding through a deeply rooted and context bound methodology. This research does not aim to produce a generalisation of

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<sup>12</sup> Being Portuguese and having read Freire in our common language, posed some issues regarding the translation of concepts like ‘conscientização’ or ‘conscientization’, which is much more than becoming aware of something, as it also incorporates a call for action. ‘Conscientização’ means to think critically and to act accordingly, thus being simultaneously intellectual construction and social agency.

what sustained museum engagement should be, or look like, or to present the conditions under which that sort of engagement should necessarily occur. Concurrently, it does not deploy a hypothesis-based research design, as it is eminently an exploratory endeavour into the nature of adult's sustained engagement and museum experiences, with two local Portuguese museums. All these attributes discourage a quantitative analysis.

Thus, this research design is based in a multiple case study approach. Two museums were investigated: the *Museu do Trabalho Michel Giacometti* and the *Núcleo Museológico de Alverca*. They are both from the Greater Lisbon geographic area and they are both governed by their respective municipalities, the Setúbal city council, for the former, and the Vila Franca de Xira city council, for the later. In parallel, regarding data collection, the research design has opted for conducting in-depth open-ended interviews with museum adult visitors over forty-five years old whose connection with one of the case study museums, has been happening throughout an extended period of time. The methodological approach to these interviews was inspired by Narrative Inquiry (Clandinin 2007). We used purposeful sampling (Patton 2002) to select the research participants from the two case study museums. We have also interviewed museum practitioners regarding their professional practice and their views on the specificities of local museology.

Regarding the interpretation procedures, this thesis's exploratory nature was underpinned by the decision to code the data generated using a Constructivist Grounded Theory (Glaser & Strauss 1967) inspired approach. The analysis of the qualitative data gathered was mainly inductive as we did not tackle it with a predetermined theory, nor with a rigid set of assumptions. The coding process was immersive, after the verbatim transcription of all the interviews (over 29 hours), several cycles of coding were used in a tentative process of category

construction and the subsequent analytical interpretation was undertaken.

Focused on the relationship between 20 adult individuals and the selected museums, this study aims to understand and to provide a meaningful interpretation of the nature of that engagement. The how and why those connections occur. An extensive rationale for all this thesis methodological choices is provided in Chapter Four.

#### **1.4. Structure**

This thesis follows a common structure to many PhDs: introduction, context, methods, findings and conclusion. It has started with the introduction, Chapter One, providing a rationale for the research undertaken, it has briefly summarised the main theoretical contributions that frame its context inside the museological debate, and it has moved on to review the methodological strategies employed to collect and interpret this research data.

Chapters Two and Three focus on context. A Literature Review is presented in Chapter Two, outlining the main relevant contributions to the issue of *museum experiences*, *museum learning*, *adult learning*, and *museums and identity work*. Chapter Three provides a different sort of context, regarding Portuguese museology. It starts by looking at the historical contingencies and contemporary condition of Portuguese museums, starting in 1974, after the Democratic Revolution which put an end to four decades of dictatorship. It subsequently tackles the bureaucratic reorganization of the Portuguese museumscape, between the years 1990 and 2000 and it moves on to report the beginning of the century and the call for new museological standards. This section finishes by presenting significant statistical data regarding Portuguese museums. The Chapter proceeds to address the subjects of museum



communities, and of Portuguese local museums and their communities. This Chapter concludes by acknowledging the voices in the field and presents primary data gathered through research interviews with museum practitioners from the two case study museums.

Chapter Four presents this thesis's methodological stance as well as its larger epistemological and theoretical underpinning. It starts by addressing the influence of Constructivism and Critical Pedagogy in the shaping of this thesis's theoretical perspective and it proceeds by acknowledging the inspiration found in Narrative Inquiry for the subsequent research design. This research design and data collection is delineated by re-stating the research purpose and objectives, the research questions, the case study design, the selected case study museums, the sampling procedures, and data collecting through Narrative interviews. The personal impact on the methodology is also recognised. Chapter Four continues by analysing the data procedures, such as the coding process and the interpretation practices at play. This Chapter concludes by focusing on the ethical issues faced by the research project.

Chapter Five and Chapter Six are the research findings chapters. The data from the two case studies is presented thematically focusing on the similarities and coherencies across the two museum sites. Chapter Five focuses on this thesis's key argument and findings. Grounded on the data collected, this thesis proposes that participants engage on sustained relationships with local museums as a part of their ongoing identity construction process. From the analysis undertaken in the case study museums it became evident that participants' identity work could be clustered into three major categories, coined as: 'Learners'; 'Cultivated'; and 'Amateur Collectors'. This Chapter presents collected data underpinning these findings and discusses them vis a vis the literature's theoretical backdrop. Chapter Six addresses ancillary findings regarding adult engagement in the two case study museums,

looking at the social motivations for engagement, the impact of positive museum leadership in visitor's engagement and participation. It also describes an additional research exercise, which uses participant-led 'guided-tours' as a method to further explore adult's museum engagement. The Chapter concludes observing the differences and specificities of the two case studies.

This thesis ends with the Conclusion Chapter, which revisits the research problem, summarises the thesis findings, discusses the implication and practical applications for the research. It concludes outlining some recommendations for further research.

### **Closing Remarks**

Throughout this Introductory Chapter, we have aimed to give an overview of this thesis: the reasons why we considered it necessary to undertake this research project and its contexts, both in terms of what the museological field has contributed to the knowledge of the issues under study, and also the specific research context regarding the Portuguese museological system and the role local museums play in it. We have also outlined this thesis's methodological approach, describing methods for data gathering and data interpretation. We have finished by presenting the thesis structure, introducing its chapters and summarising its contents.

Hence, over the next pages, we propose to follow Gille Deleuze's challenge and venture to 'dive deeply into the colourful thickness of a problem' (Deleuze, 2000: 277 – [our translation]). We will start by reviewing the relevant literature.

## Chapter Two: Mapping museum experiences – a literature review

### 2.0. Preamble

According to Justus Randolph, along with the delimitation of the research problem, the probing of new lines of inquiry, and the contextualisation and rationalisation of the research problem, a substantive literature review ‘provides a framework for relating new findings to previous findings’ (Randolph 2009: 2). It can additionally offer an understanding of what is the thesis original contribution *vis a vis* what the field has established as a valid body of knowledge.

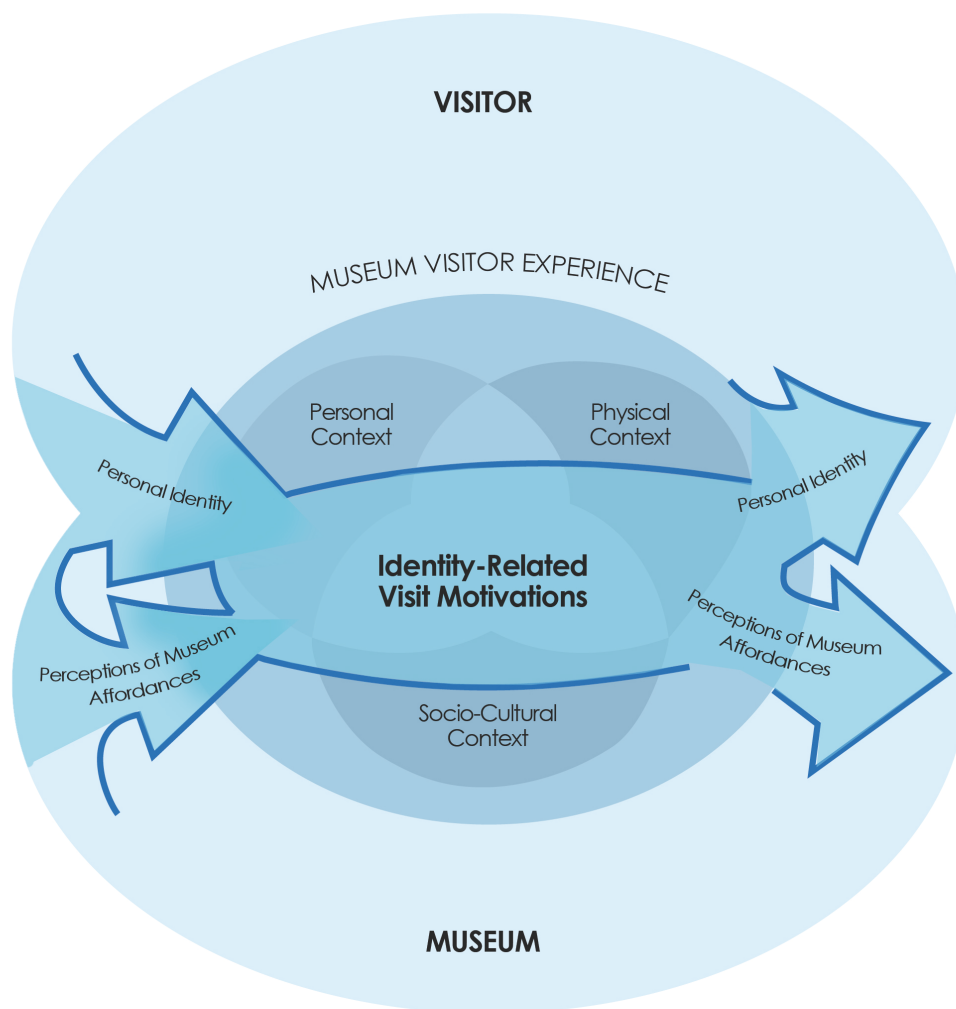
Thus, with this comprehensive intent in mind, over the next Chapter, we will set out to map the contemporary lines of thought regarding the concept of museum experiences, focusing on its key threads. We will start by looking into current research relating to the nature of museum visitor experiences, unpacking this complex and multidimensional concept (Pekarik, Doering & Karns 1999: 153). We will move on to address *museum learning experiences* summarising the main contributions to this subject. And finally, we will appreciate the literature regarding museum visitor’s *experiences and identity* construction issues.

## 2.1. Museum Visitor Experiences

At this point, it is essential to clarify the basic operative concept that, not only underpins our research, throughout but is also the fundamental notion for this particular Chapter: the one of *Museum Experience*. What is precisely a museum experience? And how it has been defined within the Museum Studies' field?

When Pekarik, Doering, and Karns looked at the literature, in 1999, they were not able to find 'a comprehensive theoretical framework of experiences in museums' (Pekarik, Doering & Karns 1999: 152). Nevertheless, they pointed out some significant contributions to the subject, such as: Annis' (1986) 'three levels of symbolic engagement in the museum (*dream space* – where museum objects interact with our deep 'subrational consciousness'; *pragmatic space*; *cognitive space*); Korn's (1992) argument that museum experience is something that transcends the educational sphere; Kaplan's et al (1993) suggestion that museums can provide what they called 'restorative environments', which allows for restorative experiences. But perhaps the major contribution to the initial debate was Falk and Dierking's (1992) influential three-folded model on visitor's museum experience. They argued that every museum experience could be understood using a contextual framework that recognised: i) the visitor's *personal context* (her/his motivations, interests, expectations when coming through the museum's door); ii) the visitor's *social context* (the existence, or not of, a social network impacting on the visit); and finally iii) the *physical context* (the museum actual physical scenario, where the visitor lives her or his museum experience). These three contexts overlap and intersect forming a complex system that the authors have been exploring, over the past two decades, in an effort to make stronger its conceptual validity.

As a result, in 2009, Falk presented his new take on the initial *Contextual Model*, naming it *The Museum Visitor Experience Model*, which he believes to be ‘not just a descriptive model of the museum visitor experience, but also a predictive model’ (Falk 2009: 9). Falk considers that ‘the breakthrough’ of his new understanding of museum visitor experience occurred when he started acknowledging visitor’s identity construction as the key element of the engagement.



**Figure 2 - Falk's Museum Visitor Experience and the Role of Identity-Related Visit Motivations Model (Adapted from Falk 2009: 161)**

In Falk's 2009 model, identity-related issues are at the core of the experience a visitor may have in a museum. And because we do not have a single identity, our complex identity-system (in which competing and overlapping constructions of one's self occur) pre-conditions which 'type' of experience one may have in one particular museum. Or even how that experience can change despite the setting remaining the same (the same museum, multiple visits).

Returning to Pekarik, Doering and Karns's literature review, after acknowledging these contributions they considered that:

Although they differ in their details, these reflections on experiences in museums all agree that a museum visit can be very complex, involving different dimensions of a visitor's life, including the physical, the intellectual, the social, and the emotional. (Pekarik, Doering & Karns 1999: 153)

Thus, they decided to turn to empirical research in an effort to shed more light on this somewhat elusive subject. Pekarik, Doering & Karns' extremely comprehensive study (eight studies at nine different Smithsonian museums) allowed them to progressively develop a taxonomy for museum experience, particularly those experiences visitors considered to be 'satisfying museum experiences' (Pekarik, Doering & Karns 1999: 153-154). They summarised them in the following table:

<p><b>Object Experiences</b></p> <p>Seeing the 'real thing'</p> <p>Seeing rare / uncommon / valuable things</p> <p>Being moved by beauty (aesthetical awe)</p> <p>Imagining ownership of those objects</p> <p>Professional development</p> <p><b>Cognitive Experiences</b></p> <p>Gaining information or knowledge</p> <p>Enriching understanding</p> <p><b>Introspective Experiences</b></p> <p>Imagining other times or places (historical imagination)</p> <p>Reflecting on meaning</p> <p>Recalling personal traveling / childhood experiences / other memories</p> <p>Feeling a spiritual connection</p> <p>Feeling a sense of belonging or connectedness</p> <p><b>Social Experiences</b></p> <p>Spending time with friends / family / other people</p> <p>Seeing offspring learning</p>
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**Figure 3 - Satisfying Museum Experiences Table (Adapted from Pekarik, Doering & Karns 1999: 155-156)**

They also found that a particular type of experience, due to either the exhibit's characteristics or to the visitor's context and preferences, could be excluding or inhibiting others on the basis of what the authors believed to be the:

[...] inherent conflict between the presentation of an object and the presentation of information. In other words, the more a design emphasizes the object, the less it can emphasize the text, and vice versa. (...) Similarly, we recognize the possibility that Introspective and Social experiences work against one another. (Pekarik, Doering & Karns 1999: 161)

Although this study is bound to its contextual research scenario (Smithsonian Museums in the United States of America) and had, what

we would define as, a very pragmatic underpinning, it is possible to acknowledge valid theoretical contributions to the subject of *museum experience*. At this point, it is safe to assume that both theoretical contributions and field research point to visitor's museum experiences as being multi-layered, often comprising an array of *cognitive engagements* that can be brought up either by the object's intrinsic qualities. Either by the communication efforts put up by the museum team (*e.g. learning experiences*), or by a variety of *social interactions* (be it among the visit group, be it, at a larger scale, between the individual and its community), or by providing *introspective and restorative* moments (that can also be brought up, for instance, by the aesthetic qualities of what is being experienced). All these experience 'strata' contribute to the construction and (re)validation of the visitors' identity schemata, as we will explain later in this Chapter.

However, a comprehensive review of the significant contributions to this debate would not be complete without acknowledging Mark O' Neill's critical view on the matter (2006: 95-96). O'Neill considers that the answer to what the field believes to be the nature of a museum experience depends on its *epistemological approach to the purpose of museums*. Thus, if one believes the purpose of museums to be fundamentally dependent on the completion of its internal and intrinsic functions (such as preservation), then this 'essentialist'<sup>13</sup> take on museums will acknowledge museum experiences as 'non-instrumental' and valid 'for their own sake'. In this case, the experience is less nuanced and, in a way, not subject dependent 'because the same experience is provided on an identical basis to everyone.' (O'Neill 2006: 96). Therefore it is safe to assume that, inside this paradigm, all those

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<sup>13</sup> We can find in Hilde Hein's book *Museum in Transition* an example of this 'essentialist' view presented in a somewhat nuanced and up-to-date argument (Hein 2002).



different layers, which can constitute a museum experience and that we have been presenting, are of less use to the field:

Essentialist museums which see themselves as providing beauty or knowledge for their own sake tend to be reluctant to define visitor experiences, other than in very vague and general terms. The visitors they target are highly idealized figures drawn from Victorian armchair psychology and formalist aesthetics, committed to appreciating pure form and to doing the homework required for object experiences. They also tend to imagine these usually solitary visitors as having pure sensory experiences, as if engagement with the world without interpretation were possible. (O'Neill 2006: 105)

On the other side of the epistemological spectrum to museum's purpose, we find all those for whom museums 'derive their meaning primarily from the services the institution provides to society as a whole, in the present and in the future.' (O'Neill 2006: 97). Mark O'Neill classifies this paradigm as 'the adaptive model', which he believes to be 'the driving force of a great deal of innovation in museum theory and practice in the past 30 years.' (O'Neill 2006: 97) In this model, we can assume that museum experiences are bound to be intensely subject dependent and multi-layered. Concurrently, we can also accept that it is in that experiential moment, when museum and individuals come 'face to face', that a core purpose of museums comes to live.

Criticizing both these paradigms are all those in the field who believe that both sides of the spectrum continue to perpetuate the political *status quo*. For these 'ideologists' some museums, notably those with 'universal' pretensions such as the British Museum continue to be 'as much anti-democratic, elitist, patriarchal and colonizing instruments of class and imperial oppression and control, as drivers of progress and improvement' (O'Neill 2006: 98). And we could add that, from this point of view the experiences museums are promoting can never truly be about the individual's self, but more like a sophisticated version of a

‘room of mirrors’ where the only figure reflected is the one of the institution and of what it has been historically standing for.

Throughout this passionately argumentative piece, O’Neill questions if the field is ever to agree and to communicate what constitutes a museum experience until it has established its own ‘general museum epistemology’. One that can help the discipline move past ‘the knowledge frameworks and tribal affiliations of the different segregated professions, disciplines, and traditions which work within museums.’ (O’Neill 2006: 99) Such general museum epistemology ‘would lead museums to take more responsibility for the quality of visitor experiences, not to transmit the museum’s message more effectively, but to increase their choices and promote growth in terms of realising their potential.’ (O’Neill 2006: 112)

In short, we can infer from O’Neill’s argument that museum experiences are both about objects and people, and that these two vectors should not continue to be somewhat perceived in the field as being mutually exclusive. But even more importantly, museums should not assume any given, or fixed, or preferable mode of *museum experience* if they are to be considered relevant social agents, which aiming to play a part in the construction of ‘a culturally rich, humane, just and tolerant society’ (O’Neill 2006: 114).

At this point, it would be amiss not to acknowledge another interpretation and context in which the notion of museum experience has been used, despite being less relevant to our own purposes and analysis in the framework of this thesis. It has been recognised that the shift from ‘conservationism to commercialisation’ that started in the United States of America museums, in early 1980, introduced the idea of ‘museum experience’ in the context of the creative industries (Florida 2004). Which, according to Nemane Bieldt, ‘espouses the idea of using art, culture, and creativity to stimulate economic growth and generate

wealth' (Bieldt 2012: 2). Museums were now supposed to provide attractive, interactive, preferably multimedia and hands-on encounters that, in a way, resonated with the background of the visitor's consumer experiences. Interesting inputs on the subject can be found in Alexander (1999), Rowley (1999), and Bieldt (2012).

## **2.2. Learning Experiences in the Contemporary Museum**

Early in 1997, Lisa Roberts presented a summary of how education and learning in the museum context came to be at the contemporary museum's core<sup>14</sup>. She called it a 'revolution', a 'major shift in thought' that, not only gave a new status to education professionals inside the museum, but also acknowledge 'visitors' perspectives to bear on the treatment of collections. Their mode of display, 'what is said about them, and who does the saying'; giving 'visitors a voice in determining the significance of collections' (Roberts 1997: 2).

It is important to stress that Education in itself was not an exotic notion to museums. In fact, the cultural edification of its public was one of its founding pillars (Hudson 1975). However, the Enlightenment Museum had seen education as a one-way stream, with objects being collected and displayed as illustrations of predefined taxonomic knowledge. Throughout the nineteenth and a considerable part of the twentieth centuries, the museum's public was to be educated into the novel scientific notions, if visiting a science related exhibition, or, if visiting a gallery, was expected to passively 'absorb' the artistic canon<sup>15</sup>.

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<sup>14</sup> Later Eilean Hooper-Greenhill would classify it as the 'educational turn' inside the museological institution (2007: 5)

<sup>15</sup> This idea is eloquently expressed in Sir Henry Cole's phrasing: 'If you wish your schools of science and art to be effective, your health, the air, and your food to be wholesome, your life to be long, your manufactures to improve, your trade to increase, and your people to be civilized, you must have museums of science and art, to illustrate the principles of life, health, nature, science, art and beauty'. (Sir Henry Cole, *apud* Roberts, 1997: 122)

The emergence of industrial societies ‘required nations and nationalism’ (Smith 1999: 46) and museums consolidated the idea of a national heritage, a shared national culture. Therefore, the museum played its part in the normalization of knowledge and values, which were essential to the establishment and consolidation of the centralised Western Nation States.

So, what exactly entailed this ‘revolution’ Roberts acknowledges? How did these authoritative internally driven museums stop seeing their educational role as a mere by-product of its more essential functions? Those of collecting, preserving and researching. What influenced that shift, particularly, what changed in the broader educational field and in the learning sciences that may have influenced museums across the world? And, finally, what is being recognised by current research as a museum learning experience? Over the next sections, we will address these questions by reviewing what we consider to be the essential contributions to the discussion.

#### 2.2.1. From knowledge to knowledges, from education to learning

In her influential work, Roberts describes the ‘shift of thought’ museums had been experiencing for the past decades recognising how the idea of knowledge, as being the matter of objective and verifiable truths, began to be replaced by a novel paradigm that acknowledges scientific axioms as circumstantial and contextual constructs. And she correctly anticipated that museums would become increasingly concerned with their role as ‘narrators’ of plausible interpretations while, simultaneously, building favourable fostering environments for individual meaningful interpretations:

Far from eradicating the need for education, however, new views of knowledge have rendered it more acute. Now, the task of education is about not just interpreting objects but also deciphering interpretations

– in other words, anticipating and negotiating between the meanings constructed by visitors and the meaning constructed by museums. This may be a rather unorthodox definition of education, but is one that accounts for the existence and the legitimacy of multiple meanings. (Roberts 1997: 3)

Roberts also pointed out some of the questions that had started to intrigue visitor studies' research field regarding the nature of museum visitor experience, particularly its learning value:

[...] this scientific voice has revealed aspects of visitor experience that are less readily subject to examination. While experiences such as social interaction, private reverie, fantasy, and play are hardly new, their role in the learning process has begun to be examined more closely by researchers. In so doing, they have raised questions about what is museum education's rightful arena and whether scientific inquiry is the best way of continuing to promote it. Does museum education include any experience that somehow broadens one's vista? (Roberts 1997: 7)

As mentioned at the beginning of this Chapter, John Falk and Lynn Dierking's (1992) pioneer work, published earlier in the 1990s, had presented a first theoretical model for the understanding of museum experiences. *The Interactive Experience Model*, later renamed as the *Contextual Model of Learning* (2000), was based on the premise that every museum experience is always bound to its various contexts rendering it an intrinsic social phenomenon.

Along with Falk & Dierking (2000)<sup>16</sup>, Roberts was one of the first to recognise, that 'the term "education" ha[d] become too restrictive and

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<sup>16</sup> In their words: 'Perhaps the greatest impediment to understanding the learning that occurs in museums has been that social scientists, educators, museum professionals, and the public at large have historically thought of museum learning as being similar to traditional models of learning, such as the transmission-absorption model.' (Falk e Dierking, 2000: 9).

misleading for the museum setting’. And that ‘there ha[d] been a conscious shift toward the use of language like “learning” (emphasizing the learner over the teacher), “experience” (highlighting the open-endedness of outcome), and “meaning-making” (stressing the act of interpretation)’ (Roberts 1997: 8). This idea of a shared construction of meaning had been previously suggested by Lois Silverman (1995):

The concept of meaning-making provides a useful new approach to understanding visitor experiences in museums. It clearly highlights the visitor’s active role in creating meaning of a museum experience through the context he/she brings. A closer look suggests that many of visitors’ meaning-making strategies are actually behaviors basic to most humans; integral parts of daily life for museum personnel, visitors, and nonvisitors alike. (Silverman 1995: 161)

A few months after the publication of Roberts’ book, the American museologist George Hein would share his own thoughts on what was changing in the field, but also on what he considered to constitute *Learning in the Museum* (1998). His views on the constructive nature of learning were deeply rooted in what the sciences of learning and the theorists of education outside the museum’s field had been postulating over the last decades of the twentieth century. We will now look more closely into these ground-breaking epistemological contributions.

## 2.2.2. Museum Learning in Perspective – Contemporary Theories of Learning

We argue that the German philosopher Werner Heisenberg's contribution is critical here. His efforts to find absolute truths outside mathematic axioms lead him to postulate the 'uncertainty principle' (1927) based on the observed and proved impossibility to isolate scientific physics experiments of its material and contextual circumstances. Scientific knowledge became inexorably bound to its exterior conditions and this led, after being appropriated by other science philosophers and social scientists, to what Thomas Kuhn (1962) later described as a *paradigm shift* in which *interpretation* began being recognized as an inescapable element of scientific inquiry. This epistemological shift, which disturbed the foundations of the previous positivist paradigm, came to be at the centre of a new understanding regarding the nature and fabric of knowledge.

### **i) Constructivism**

We can also argue that *constructivism* was a consequent development of this new understanding regarding our capability of grasping the 'real' world. Its foundations were initially developed by Jean Piaget and Lev Vigotsky<sup>17</sup> and it constitutes one of the most influential learning theories to date. According to von Glaserfeld:

The key idea that sets constructivism apart from other theories of cognition [...] was the idea that what we call knowledge does not and cannot have the purpose of producing representations of an independent reality, but instead has an adaptive function. This changed assessment of cognitive activity entails an irrevocable break with the generally accepted epistemological tradition of Western

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<sup>17</sup> Piaget and Vigotsky worked in two continents apart in a time when physical distance was deepened by severe geopolitical constraints. Being a soviet scientist, Vigotsky's work was only lately disseminated and Piaget would later recognise many similarities between the two (Piaget 1962).

civilization, according to which the knower must strive to attain a picture of the real world. (Glaserfeld 2005: 3)

In that regard, constructivism is a genuinely non-positivist approach to knowledge while, simultaneously, it sets itself apart from other theories of learning such as *behaviourism*<sup>18</sup> and *maturationalism*<sup>19</sup>. (Fosnot & Perry 2005: 10)

Rather than behaviors or skills as the goal of instruction, *cognitive development* and *deep understanding* are the foci; rather than stages being the result of maturation, they are understood as *constructions of active learner reorganization*. Rather than viewing learning as a linear process, it is understood to be *complex* and fundamentally *nonlinear* in nature. (Fosnot & Perry 2005: 10-11)

Jean Piaget's ideas on the subject of human cognition were influenced by his early research in the field of biology. He considered that the adaptive pattern organisms exhibit towards their environment, its evolution, could also be recognised in humans' ability to construct new meanings when facing contradictory and disruptive cognitive settings. In his work *The Development of Thought: Equilibration of Cognitive Structures* (1977: v), he proposes the concept of *equilibrium*: the mechanism. That both independent living organisms and human brains use to allow transformative change through what he described as non-linear cycles of *assimilation* (organising the experience in a way that it resonates with previous similar experiences) and *accommodation*. According to Fosnot & Perry:

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<sup>18</sup> 'Behaviorism is the doctrine that regards psychology as a scientific study of behavior and explains learning as a system of behavioral responses to physical stimuli.' (Fosnot & Perry 2005: 8) Over the decades it has been subject to severe scrutiny based on its epistemological assumptions and also on its ethics regarding empirical experiments.

<sup>19</sup> '[...] maturationalism is a theory that describes conceptual knowledge as dependent on the developmental stage of the learner, which in turn is the result of a natural unfolding of innate biological programming.' (Fosnot & Perry 2005: 9)



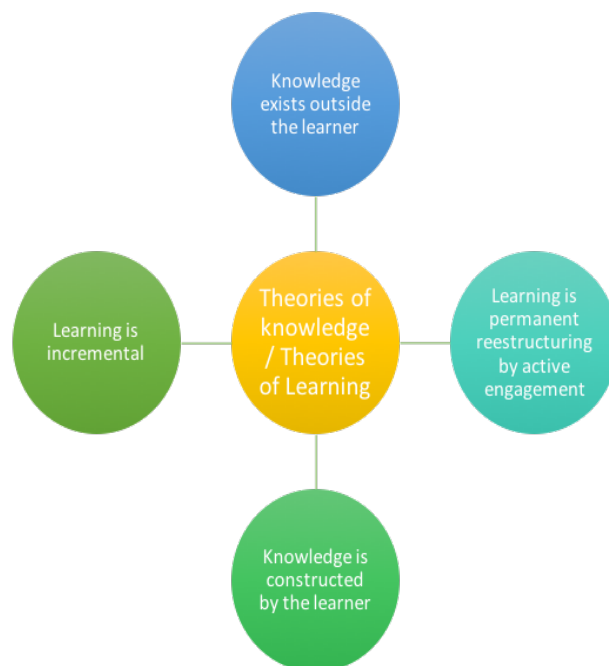
Piaget explains how; at times, this process results in a 'reach beyond the grasp' as one evolves, searches for new knowledge, and encounters 'new territory'. In these new situations the organism's activity attempts to reconstitute previous behaviors to conserve its functioning, but every behavior results in an accommodation that is a result of the effects or pressures of the environment. (Fosnot & Perry 2005: 16-17)

Humans crave for meaning, and learning has been a timeless strategy used to solve the intricate puzzles that surround us (Falk & Dierking 2000). The construction one operates in the face of a common circumstance is always particular to the individual and built in relation to one's ideas, schemes, and representations. Nevertheless, Fosnot and constructivists in general claim that our ideas can be discussed and meaning can be negotiated until accepted by our cultural and social communities (or *interpretive communities* in the words of Hooper-Greenhill (2007)), thus rejecting any type of solipsistic communicational dead end (Fosnot 2005: [5]).

The constructivist approach to human cognition and learning would have an impact on the work of contemporary learning scientists and theorists such as Howard Gardner. Gardner's influential research has helped learning experts to recognise the complexity behind the concept of intelligence. He has argued that, contrary to traditional beliefs, an individual's intelligence could not be understood looking exclusively to hers or his logical-mathematical or linguistic skills. Instead he proposed a different framework to analyse intelligence: The Multiple Intelligence Theory. Initially proposed in 1983 and subsequently reframed in 1993 and 1999 to foster additional intelligence categories, in it Gardner enumerates the following intelligence modalities: verbal-linguistic; logical-mathematical; visual-spatial; musical-rhythmic and harmonic; Bodily-kinaesthetic; interpersonal; intrapersonal and naturalistic (1999). In more recent years, Gardner has also referred to existential intelligence and teaching-pedagogical intelligence. According

to Gardner, individuals have a combination of these multiple intelligences, but seem to prioritise a distinct intelligence or set of intelligences. His theory has influenced the learning sciences by acknowledging that the way we learn best is linked with our dominant intelligences.

As for the museum studies field, perhaps, the clearest example of a constructivist interpretation of how visitors learn in a museum setting is to be found in *George Hein's Learning in the Museum* (1998). In this influential work, Hein presents a comprehensible overview on how different museum epistemologies, and the implied assumptions regarding human learning, lead to particular museological strategies of display. In 2006, he restated his model:



**Figure 4 - Hein's Theories of Education Chart (Adapted from Hein 2006: 346)**

Hein aligns himself with the constructivist paradigm stressing that if 'is possible for people to construct personal knowledge then we have to accept the idea that it is inevitable that they do so, regardless of the efforts to constrain them' (Hein, 1998: 35). He also acknowledges the

imbalance of power in the traditional educational relation between teachers/students or museum/visitors, suggesting that constructivism can offer an alternative:

The validity of ideas according to constructivists does not depend on their match to some objective truth, which has an existence separate from any learner or group of learners. Rather, validity arises from the value of the concepts in leading to action (use) and in the consistency of the ideas one with another. Thus, while traditional educators talk about learner's misconceptions, constructivists will talk only about naïve, personal, or private conceptions. (Hein 1998: 34)

This imbalance of power has its translation in the museum context in the traditionalist view of museum education transmitting top-to-bottom its curatorial beliefs.

However, we are aware of Lindauer's view towards constructivism in this regard. She considers that although acknowledging this imbalance, constructivists think the social purpose of education in much more limited terms. For them, learning generates new skills and competencies, which enable new experiences, making the individual more prepared to act in different scenarios. Whereas, for instance, for critical pedagogues, learning must be transformative to address the questions of inequality. Thus, critical pedagogy should be considered as a more ambitious theoretical framework; devising a core political dimension that constructivism fails to embrace (Lindauer 2007: 306-307).

## **ii) Critical Pedagogy**

Margaret Lindauer is among those in the field of museology who have been influenced by the words and thoughts of the Brazilian pedagogue

Paulo Freire. Her take on *critical museum pedagogy*<sup>20</sup>, along with other museologists such as Viv Golding<sup>21</sup> and, to some extent, Eilean Hooper-Greenhill, is deeply rooted in the theoretical seeds Freire began to spread in the late 1960s, as we will try to make clear. And again, it is an indication of how permeable the museum studies field has been to major educational debates in the last decades.

Critical Pedagogy or, as in Paulo Freire's early formulation, *Pedagogia do oprimido/Pedagogy of the oppressed* initially first published in 1967, is the result of many years working directly with illiterate rural communities. First in Brazil, and after his political exile, in Chile alongside the Democratic Agrarian Reform Movement and the Food and Agriculture Organization of the United Nations. (Freire 1970; 2000: 23 [original's emphasis])

Freire formulated a theoretical framework that can help us understand how generations of underprivileged communities (the *oppressed*) have been systematically denied the instruments of their own humanization; the tools to fully become a self-conscious individual. He stated that:

This book will present some aspects of what the writer has termed the pedagogy of the oppressed, a pedagogy which must be forged *with*, not *for*, the oppressed (whether individuals or peoples) in the incessant struggle to regain their humanity. This pedagogy makes oppression and its causes objects of reflection by the oppressed, and from that reflection will come their necessary engagement in the struggle for their liberation. And in the struggle this pedagogy will be made and remade. (Freire 1970; 2000: 48)

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<sup>20</sup> Vide Lindauer, Margaret (2007) Critical museum pedagogy and exhibition development: a conceptual first step in Knell, MacLeod & Watson (2007) *Museum Revolutions: How museums change and are changed*, London & New York, Routledge, pp: 303-314

<sup>21</sup> Vide Golding, Viv (2009) *Learning at the Museum Frontiers: Identity, Race and Power*. Burlington: Ashgate.

He argued that this pedagogy could not be forced on the oppressed by the oppressors, as other pedagogical approaches have done in the past, by externally imposing an educational system that continues to replicate a social model based on inequality and injustice that leads to dehumanisation. On the contrary, it would be through gaining consciousness of the oppression historically imposed on them that individuals would critically discover their capacity to *become more* (*ser mais*, in the original) (Freire 1968; 1970; 2000: 37).

By so doing, he coined the term of *conscientização/conscientisation* to describe this critical discovery that the individual is able to operate when *practicing* the pedagogy of the oppressed. For he understood this pedagogy to be more than a simple theoretical approach to inequality; he believed it to be a *liberating praxis*, ‘a pedagogy for all people in the process of permanent liberation’. (Freire 1970; 2000: 54).

As for the traditional educational system, he presented a powerful image to describe it, its consequences and the assumptions on which it is based; he called it ‘the banking concept of education’ (Freire 1970; 2000: 72). He described this concept in a way that, in our opinion, resonates with the constructivist critique of traditional education:

The teacher talks about reality as if it were motionless, static, compartmentalized, and predictable. Or else he expounds on a topic completely alien to the existential experience of the students. His task is to “fill” the students with the content of his narration – contents which are detached from reality, disconnected from the totality that engendered them and could give them significance. Words are emptied of their concreteness and become hollow, alienated, and alienating verbosity. (Freire 1970; 2000: 71)

Education seen in the traditionalist, positivist terms is something that happens unilaterally with teachers ‘filling’ the student’s knowledge gaps

(the frequent ‘empty vessel’ metaphor). Through a process that is both *imbalanced* – as it assumes a strict hierarchy in student/teacher relationship in which the teacher is the geometrical opposite of the student, and that the ignorance of the later justifies the existence of the former; and *externally imposed*. With students passively absorbing (or not) curated pieces of accepted and validated *knowledge*. In Freire’s words:

Education thus becomes an act of depositing, in which the students are the depositories and the teacher is the depositor. Instead of communicating, the teacher issues communiqués and makes deposits which the students patiently receive, memorize, and repeat. This is the “banking” concept of education, in which the scope of the action allowed to the students extends only as far as receiving, filing, and storing the deposits. They do, it is true, have the opportunity to become collectors or cataloguers of the things they store. But in the last analysis, it is the people themselves who are filed away through the lack of creativity, transformation, and knowledge in this (at best misguided system. (Freire 1970; 2000: 72)

Paulo Freire believed that knowledge, and intelligence itself<sup>22</sup>, emerges solely through a restless, impatient, continuing process of inquiry individuals establish with the world after gaining consciousness of their particular situation of oppression.

Although deeply rooted in the South American sociological context, Freire’s words would have a substantive dissemination after his book was translated into English in 1970. Notably, in the United States of America where its own historical *zeitgeist* (black activism, feminism, youth anti-establishment culture, among other social movements) render it poignantly significant. It would be in the United States

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22 Later in his life he would state that: ‘Intelligence is created, is constructed, it is not received... [...], we keep constructing intelligence through the struggle to comprehend and change... the world; it is then that intelligence is made, constructed, and it is there! (Freire, audiovisual interview available at [www.freireproject.org](http://www.freireproject.org))

academia that the *Pedagogy of the oppressed* would begin to be known as *Critical Pedagogy(ies)*. And, critical pedagogues like Peter McLaren, Joe Kincheloe, and Henry A. Giroux (among others) would be instrumental in the dissemination of Freire's ideas in a more global context<sup>23</sup>.

When asked to describe the importance of coming to know Freire's work as a young teacher, Giroux considers that when first reading *Pedagogy of the oppressed* he was finally given a theoretical framework to understand why pedagogy is central to politics and is not confined to education. It also allowed him to link learning to social change and it gave him a way to be pedagogically involved. (Giroux; audio-visual interview available at [www.freireproject.org](http://www.freireproject.org))

However, the Freirean legacy has suffered, also, from interpretations that are far from its original spirit. A particular tendency emerged in the educational field to transform Freire's pedagogy in a pragmatic, a-critical methodology to be implemented in the classroom. Henry Giroux and Donaldo Macedo have been particularly aware of this adulteration of Freire's ideas, pointing out how such an approach removes from the educational dialogue the core and fundamental questions recognized by Freire, those of self-reflection, power imbalance and critical agency (Giroux 2010). Macedo considers that such educators:

[...] mistakenly transform Freire's notion of dialogue into a method, thus losing sight of the fact that the fundamental goal of dialogical teaching is to create a process of learning and knowing that invariably

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<sup>23</sup> For instance, for other geographical latitudes, we can note Donaldo Macedo's account of what it meant for him as an individual of a colonised country to come across Freire's work: 'I remember vividly my first encounter with *Pedagogy of the Oppressed*, as a colonized young man from Cape Verde who had been struggling with significant questions of cultural identity, yearning to break away from the yoke of Portuguese colonialism. Reading *Pedagogy of the Oppressed* gave me a language to critically understand the tensions, contradictions, fears, doubts, hope, and "deferred" dreams that are part and parcel of living a borrowed and colonized cultural existence.' (Macedo 2000: 11)

involves theorizing about the experiences shared in the dialogue process. (Macedo 2000: 17)

But Macedo's criticism goes deeper, suggesting that these educators are perpetuating social *status quo* in a disguised, pseudo-progressive fashion:

At the same time, educators who misinterpret Freire's notion of dialogical teaching also refuse to link experiences to the politics of culture and critical democracy, thus reducing their pedagogy to a form of middle-class narcissism. This creates, on the one hand, the transformation of dialogical teaching into a method of invoking conversation that provides participants with a group-therapy space for stating their grievances. On the other hand, it offers the teacher as facilitator a safe pedagogical zone to deal with his or her class guilt. (Macedo 2000: 18)

Concurrently, Henry Giroux provides a clear argument of what critical pedagogy meant in Freirean terms:

For Freire, pedagogy is not a method or an a priori technique to be imposed on all students, but a political and moral practice that provides the knowledge skills and social relations that enable student to expand the possibilities of what it means to be critical citizens, while expanding and deepening their participation in the promise of a substantive democracy. Critical thinking for Freire was not an object lesson in test-taking, but a tool for self-determination and civic engagement. According to Freire, critical thinking was not about the task of simply reproducing the past and understanding the present. To the contrary, it was about offering a way of thinking beyond the present, soaring beyond the immediate confines of one's experiences, entering into a critical dialogue with history, and imagining a future that would not merely reproduce the present. (Giroux 2010: 716)



Despite these somehow misguided appropriations of Freire's words, Critical Pedagogy has become a complex and vibrant educational movement, not only with a significant number of followers among practicing teachers but also by having received the recognition of influential thinkers such as Stanley Aronowitz and Theodor Adorno (Giroux 2010: 3-4).

As for the impact Freire's ideas had in the museological field, early in the 1970s the Declaration of The Santiago Round Table, issued in Santiago do Chile in 1972, by a group of South American museum practitioners, already recognises the importance of Freire's ground-breaking pedagogy into the shaping of what they were proposing as a new museological paradigm, which they name as New Museology. Three other Declarations would follow in the subsequent years issued by a now fully organized group (MINON) all of which recognize explicitly or implicitly Paulo Freire's educational ideas: Quebec Declaration in 1984, Oaxtepec in 1984 and Caracas Declaration in 1992)<sup>24</sup>. The New Museology movement would become influential to the Portuguese museology as will be demonstrated in Chapter Three.

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<sup>24</sup> Vide Primo for a summary of these Declarations and history of the MINON group (Primo 2007).

### iii) **Transformative Learning**

Museums have frequently been described as transformative places, or as being able to foster transformative experiences. However, in 2012, a large international Conference on the subject of *The Transformative Museum* made clear how this attribute is significantly nuanced across the literature<sup>25</sup>. Over the next section, we will look closer to what may constitute a transformative experience, mainly a transformative learning experience, building upon the contributions from the educational field on the subject.

The term ‘transformative learning’ made its first appearance in the academic literature in a 1978 essay by Frank Mezirow, published in the journal *Adult Education Quarterly*. While this text is more than thirty years old, it remains relevant to the contemporary educational debate and also to the contemporary museum. At that time, Mezirow used the expression ‘perspective transformation’ (Mezirow 1978), wanting to convey a non-traditional meaning for learning. A form of learning that, as he stated, adults are specially bound to embrace. According to Mezirow, adults go through transformative learning experiences when:

[...] a meaning perspective can no longer comfortably deal with anomalies in a new situation, a transformation can occur. Adding knowledge, skills, or increasing the competencies within the present perspective is no longer functional; creative integration of new experience into one’s frame of reference no longer resolves the conflict. One not only is made to react to one’s own reactions, but to do so critically. (Mezirow 1978: 104)

Mezirow acknowledges ‘meaning perspectives’ as culture-based structures of thought and emotion that we make use of in our learning process. In order to develop as adults, we must challenge those views

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<sup>25</sup> Vide proceedings from the *Transformative Museum Conference*, Denmark: Roskilde University, 2012

moving ‘from an uncritical organic relationship to a self-consciously contractual relationship with individuals, institutions and ideologies’ (Mezirow 1978: 108).

His theory was influenced by the critical awareness that was rising in the sociological context of the 1970s. In the women’s movement, the anti-war movement, the Black Power movement, and in several contra-cultural phenomena; when society’s traditional margins were summoned to become critically aware of the roles they played in carrying out their ‘assigned tasks and in meeting social expectations’ (Mezirow 1978: 101). Not surprisingly, Mezirow uses Paulo Freire’s theoretical contribution regarding ‘conscientization’ (Freire 1968; 1979; 2000) so as to elucidate the possibilities of transformative learning.

In Mezirow’s more recent reflection about ‘transformative learning’, he recognizes the importance of the Freirean legacy to his work as well as to Habermas<sup>26</sup> concept of ‘communicative learning’ (Mezirow 2009: 90-91). Here he defines transformative learning as:

[...] the process by which we transform problematic frames of reference (mindsets, habits of mind, meaning perspectives) – sets of assumption and expectation – to make them more inclusive, discriminating, open, reflective and emotionally able to change.

[...] it is a metacognitive epistemology of evidential (instrumental) and dialogical (communicative) reasoning. [...] Transformative learning is an adult dimension of reason assessment involving the validation and reformulation of meaning structures. (Mezirow 2009: 92-93).

Nevertheless, as adults, we are not continually experiencing transformative learning. Mezirow considers that this sort of learning can be triggered either by a life crisis, or can happen cumulatively after

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<sup>26</sup> Jürgen Habermas (1929-) is a left-wing philosopher and sociologist influenced by critical theory.

several challenging insights that, somehow, disturb our meaning perspectives, or 'habits of mind'. Consequently, the individual begins a process of dialectical communication to establish a new and reflective judgment (Mezirow 2009: 94).

According to John Dirkx, who has devoted his career to adult education, Jack Mezirow's perspective on 'transformative learning' is deeply cognitivist and depends mainly on critical reasoning:

Although imagination and creativity play a key role in transformative learning (Mezirow, 1995), the core of the learning process itself is mediated largely through a process of reflecting rationally and critically on one's assumptions and beliefs. For Mezirow, the outcome of transformative learning reflects individuals who are more inclusive in their perceptions of their world, able to differentiate increasingly its various aspects, open to other points of view, and able to integrate differing dimensions of their experiences into meaningful and holistic relationships (Mezirow, 1991). (Dirkx, 1998: 2)

Recognizing Mezirow contribution, Dirkx considers that the idea of transformative learning has much to gain by integrating other significant perspectives. From Paulo Freire's contribution, Dirkx emphasises transformation as 'consciousness-raising' (Dirkx 1998: 1). When poor farmers learn to read, and write, the change it brings along with literacy is as much an individual cognitive process, as it is a social and political process of liberation.

Critical consciousness refers to a process in which learners develop the ability to analyze, pose questions, and take action on the social, political, cultural, and economic contexts that influence and shape their lives. Through dialog and problem-posing, learners develop awareness of structures within their society that may be contributing to inequality and oppression. Learning helps adults develop a deeper understanding of the ways in which these social structures shape and influence the ways they

think about themselves and the world. (Dirkx, 1998: 3).

Concurrently, Dirkx identifies two other important strands regarding transformative learning in adult education contemporary theories. One with a more developmental stance, present in the writings of Larry Daloz (1986) for whom transformative learning enables adults to persevere in their path towards 'improved' and richer identities. An argument that is critical for our thesis as we will demonstrate on Chapter Five. Although his research focus mainly on adults who return to higher education contexts, one can draw a parallel with adults using museums as a means to assert a particular identity, as we will attempt to justify in the later discussion of this research data (Chapter Five). The other aspect, though less well known, is proposed by Robert Boyd (1991), who, from a psychologist point of view, looks into transformative learning as 'the expressive or emotional-spiritual dimensions of learning and integrating these dimensions more holistically and consciously within our daily experience of life.' (Dirkx, 1998: 7)

So, having unpacked the concept of transformative learning as it stands for the educational field, we can now observe how the Museums Studies literature has incorporated the concept.

### **Museums and Transformation**

Drawing on her own museum experiences, the American philosopher, Hilde Hein, who devoted a paramount part of her work looking into the 'museumsphere', reminds us how transformative museums can be:

Invariably, my visits to museums have catapulted me in thought to new and other worlds, to alternative ways of thinking and feeling. Perhaps that is what museums are good for. Like philosophy, they are an avenue that conducts us to outside ourselves. (Hein, 2000: viii)

However, though we readily accept that visiting a museum can be a transformative experience, through which, in the face of its collections and unique environment, we can develop new attitudes, interests, and even new values, from what evidences are we basing our judgement? And how can we better understand and promote such experiences? These have been central questions in the work of the museologist Barbara Soren, and which she clarifies:

If ‘artists’ and scientists’ intentions are to transform through images, displays, and dialogue, is there evidence that indicates visitors change in some fundamental way when they experience objects and ideas in museums? If some sort of ‘transformation’ happens, does it happen in the museum or afterward? Does change needs to be transformative in order to be change? (Soren 2009: 234)

According to Soren’s research, there are several triggers for transformative museum experiences, those that have the potential ‘to transform or significantly change individuals’ (Soren 2009: 238). Briefly, these triggers can be organised into three main tri-fold categories, which are the authentic/ the unique/ the sublime; the testimonial/ the emotional/ the traumatic; and the cultural/ the embodied, as elaborated bellow:

Firstly, the authentic/ the unique/ the sublime categories relate to the immersion into the museum’s narrative(s), which can be achieved making use of the object’s inherent attributes. The interaction with authentic and unique material testimonies can act as transformative stimuli, adding historicity and value to the museum experience. Secondly, the testimonial/ the emotional/ the traumatic features can be experienced in first person’s recollections, which imprint a human dimension to the museum experience. One that can be truly transformative, by allowing us to move from vaguely abstract concepts into the emotional realms of being human. Finally, the last cohort, the

cultural/ the embodied describes the museum multi-sensory experiences that communicate directly with our bodies' ability to learn, 'emplacing' us in a very conscious dimension of time and space, which can set the grounds for a more culturally receptive frame of mind.

Concurrently, over the years Soren was able to identify a matrix that helps to recognise, and, up to a point, predicts the interactions between experiences in museums and visitors transformation: 1) conditions necessary to trigger transformation, but not enough to sustain transformation; 2) an increased awareness of the value of culture can act as a trigger for transformative experiences, and have the potential to sustain transformation; 3) sustained transformation is triggered by motivational experiences that result in behavioural changes. (Soren 2009: 239)

Here we can recognise a crescendo in the level of potential transformation museums can impact on an individual. We would argue that the key to significant transformation is to be found on the sustained nature of those museum experiences. The issue of sustained engagement *versus* sporadic museum visit, as relevant and interesting as they may be, can be of paramount importance when we are looking into museum's transformative potential. In Soren's words, how can a 'single visit to a physical museum that may last two hours [...] transform people in the same way a long term programme can?' (Soren 2009: 240). This idea of sustained engagement with a museum over a period of time was pivotal to this thesis research.

#### **iv) Contemporary views on Adult Learning**

In a 2008 essay, researchers Dana Dudzinska and Robin Grenier suggested that the 'existing literature on adult learning in museums suffers greatly from research that is neither theory-informed nor theory-generating, and there is a strange absence of adult education and

learning theory in museum studies' (2008: 9)<sup>27</sup>. To overcome this problem, they proposed 'cross-pollination' between museum education and adult education literature, in order to go further regarding of theory application and theory construction which is what this thesis, in part at least, aims to achieve (Dudzinska-Przesmitzki & Grenier 2008: 19).

Over the next section, we will, firstly, explore contributions on the subject of adult learning moving on to how they are shaping (or not) current debates on adult museum learning.

### **From adult education to adult learning**

For the last decades, there has been a terminology shift inside the field of education, which has increasingly replaced the expression 'adult education' with the more liberal expression 'adult learning'. This change entails a profound paradigm shift that is both epistemological and programmatic, as we will proceed to make clear.

The origins of the concept of adult education can be best understood through the lens of the modernistic worldview in which the *Enlightenment* values of human betterment, and of elucidated citizenship found in formal education its natural strategy:

Education has traditionally been the site where ideals of critical reason, individual autonomy and benevolent progress are disseminated and internalised. It is here that the project of modernity is most obviously realised. This project embodied in the grand narrative, emphasises mastering the world in the cause of human betterment by means of 'objective' knowledge and rational scientific approaches. In modernity, mastery is progress, progress mastery, where individual enlightenment, social and material development, individual emancipation and liberal democracy are seen as mutually interactive and reinforcing. (Usher, Bryant & Johnston 1997: 10-11)

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<sup>27</sup> We would suggest the exception of Alan Chadwick's et. al publication: *Museums and Adult Learning – Perspectives from Europe*.



Thus, in the modernistic paradigm, education was understood as a cumulative process of knowledge gathering based on a genuine search for *truth*, and in which scientific postulates were its logical corollary.

However, in our contemporary times, marked by a transformation of traditional socioeconomic models (vide: the growing of the service sector, post-Fordist models of production, and a globalised market (Usher, Bryant & Johnston 1997: 2)), as well as, by the disintegration of the grand narrative of everlasting progress, the traditional idea of ‘adult education’ began to be questioned. Not only for its intrinsic focus on formal modes of knowledge gathering, but also for its excessive optimism in terms of its pragmatic results in a labour market increasingly dominated by precariousness and low wages.

In our opinion, the need for adults to continue to make sense of the reality around them cannot be perceived as one’s mere strategy to better fit in an exceedingly competitive job market. On the contrary, although those motivations can be powerful and completely valid up to a point, they fail to give the whole picture. That of an inherent need which some adults experience to face the world as learners: as puzzled beings, whose curiosity is continuously triggered be it in the formal classroom, be it when reading the world news column in their daily newspaper, be it when immersed in a contemporary art exhibit. Consequently, the expression ‘adult learning’ sets out to be a better description of this urge to create meaningful explanations that human beings, in their adulthood, continue to experience. This change, from education to learning, also entails a shift from accepting that education is something that one can passively apprehend, to the recognition that learning is something one is actively involved in and in control of:

‘Adult learning’ does not, therefore, simply signify ‘out of school’ or ‘outside’ the formal educational institution, the widening and increased

incidence of learning opportunities, but more significantly the lessening of the power of the educator to define what constitutes worthwhile knowledge and serious learning, a questioning of the role of normalisation and a refusal to acknowledge that learning must always be shaped by the values of a particular conception of progress. (Usher, Bryant & Johnston 1997: 10-11)

Authors like Peter Jarvis (1995), Bill Williamson (1998), Jack Mezirow (1978) and Norman Evans (2003) make a strong case on behalf of informal, open-ended and continuous learning, which are very important features of Museum Learning as Falk & Dierking (1992) and Hein (1998) note. Refusing to accept a definition of adult learning that encloses itself to a formal, competency-based, vocational provision. In a way that resonates the words of Paulo Freire, Williamson claims that:

Learning opportunities for adults should not be judged by their utility but by how far they promote the imagination, and release the potential within all human beings to enrich the lives of others, seize their own destiny and contribute their distinctive knowledge and understanding to the solution of collective problems (Williamson 1998: 7).

To foster a democratic society, Williamson considers that cultural institutions still have a long way to go, despite their intrinsic potential. He proposes the adoption of a democratic agenda 'in which people can be engaged with the political and cultural life of their societies and finely tuned into the public debates about what values should govern their lives' (Williamson 1998: 2). Democracy cannot be built on alienation. Freire (1968), and Dewey (1916) before him were on the front line of this debate, considering education as a fundamental tool to boost political and social empowerment. Although time has passed since these contributions, and western governmental policies have begun to defend lifelong learning in their visions of the future (e.g. European Union Lisbon Strategy or, even, the UN 1997's Hamburg Declaration on Adult Learning, or, at a national level, the Portuguese

New Opportunities Programme<sup>28</sup>). We agree with Evans (2003: 10) when he disputes the validity of the economic lifelong education model these policies imply. One must be able to learn, and go on learning, not merely for the sake of a better performance in a globalized market, but for the sake of our accomplishment as human beings.

### **Adult learning in perspective**

In a comprehensive publication, the Scandinavian learning theorist Knud Illeris collects several contemporary essays in order to make a 'state of the art' regarding contemporary theories of learning in a field, using the author's own words, that is 'characterised by complexity' (Illeris 2009: 1). Illeris is convinced that, at the moment, there is no single theoretical input that is able to define learning in all its dimensions. So, he invites different perspectives and focuses concerning the learning debate in order to offer a multiple voices contribution that is, in itself, sufficient proof of a complex field. There we can find a significant debate regarding adult and lifelong learning with input from Peter Jarvis, Mark Tennant, Robin Usher and Jack Mezirow (Illeris 2009). In these essays, we come across several theoretical threads, such as: lifelong learning as a 'strategy of the self' (Jarvis 2009: 21-34, Tennant, 2009: 147-158); or transformative learning as epistemological transformation and not mere behavioural alteration (Kegan 2009:35-52, Mezirow 2009: 90-105); or learning as an experiential phenomenon integrated in socio-cultural contexts (Jarvis 2009: 21-34, Usher 2009: 169-183). These issues have become central to the educational field and, in our opinion, the research into museum learning can go further in their identification and discussion; and in so doing, may move beyond the restrictive learning outcomes debate as, for instance, Andrew Pekarik advocates (Pekarik 2010).

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<sup>28</sup> This Programme was dismantled by the XIX Constitutional Government. A neo-liberal cabinet that considered the Programme to be out of tune with the country's needs and to 'spent money that the country did not have'.

### **Lifelong learning as a ‘strategy of the self’**

When adults decide to engage in new learning experiences, even if their initial intention was as pragmatic as the attainment of an academic degree, they embark on a self-transformation journey, as they:

[...] are rediscovering themselves through learning and often recovering as adults the blighted hopes of their younger days. It is not an easy or painless process. It involves shifts in self understanding and awareness of a kind that can shake the foundations of people’s lives and encourage them to reframe their life plans’ (Williamson 1998: 11)

Adult learning is frequently described as intrinsically motivated and *self*-oriented. Accordingly, Jarvis contends that ‘the more *self*-directed the project, the greater the likelihood that learners can respond to their own learning needs and also self-actualize in the process, thus demonstrating the humanistic nature of education itself.’ (Jarvis 1995: 19, [our emphasis]).

Furthermore, Jarvis wishes to remind us that humans are unfinished beings; and that, although we feel that we *are*, the fact is we are always *becoming*. We are continuously ‘learning to become ourselves’ (2009: 30). Jarvis stresses the importance of the process (‘the travel’) over the final product (‘the arrival’). In our opinion, this does not mean that there is a ‘coherent and authentic self’ (Tennant 2009) we can aspire to, but rather that, in our life journey, we are able to make learning choices that continually forge our identities. Furthermore, it does not imply an overly positive perception of the individual over social constraints as postmodern critique suggests (Tennant 2009; Usher 2009).

We are learners in social contexts. Our social contexts may influence our learning processes since ‘learning does not occur in social isolation and that the occurrence of different forms of learning may be the result

of social and cultural pressures...' (Jarvis 1987: 11). So, although we recognize the importance of the individual self in the learning process, we, concurrently, acknowledge the perception of a social dimension of learning that, in more ways than one, serves as a counterbalance to the more psychological and cognitive approaches.

### **Lifelong Learning in Museums**

Some contemporary educational researchers such as Bill Williamson (1998) or Peter Jarvis (1995) have pointed out the important role that informal learning scenarios play in the learning path of adults.

Suggesting that 'learning in adulthood is continuous and ubiquitous; it is not confined to and should certainly not be limited by what is offered to people through the institutions of formal education' (Williamson 1998: 1). Peter Jarvis even makes a more explicit case for museums and libraries: 'Libraries, then, and museums are important adjuncts to human learning. Their existence is an indication that people seek to learn from numerous sources' (Jarvis 1995: 9).

Steps have been given to intersect museum learning theory and the educational theories and with the emerging field of the learning sciences. For instance, the Summer 2008 issue of the Journal of Museum Education (volume 33, n°2), has themes that precisely point to this intersection, aiming to 'provide new conceptual and methodological tools to both museums educators and learning scientists as they engage in understanding and shaping learning' (Zimmerman & Martell 2008).

Still, in the same issue of the journal, an article by Bronwyn Bevan and Maria Xanthoudaki (2008: 107-119) maintains that there is still a long way to go in an effort to reposition the learning debate into the museum praxis:

While much of the discourse about museum teaching and learning stresses the role of constructivist and even social-cultural approaches to pedagogy, we find in practice that, without sustained, critical, and reflective professional development, museum-based educators/floor staff – like our counterparts in other learning settings – often revert to conceptualizations of knowledge and pedagogy they themselves experienced in their own learning, usually in schools. (Bevan & Xanthoudaki 2008: 108)

Although museums have been permeable to the previously described lifelong learning debate and have adapted – for instance, by renaming their departments and staff, or by offering specific programmes and activities for adult audiences. They still tend to ‘believe an exhibition is successful when visitors have the experience that the museum intended them to have’ (Pekarik 2010: 105); using the same ‘expected outcomes’ framework a primary teacher would use to evaluate its classroom progress.

In a subsequent issue of *Curator* that features Andrew Pekarik’s paper, Linda Duke extends the debate. Responding to Luke and Knutson’s previous article, “Beyond Science: Implications of the LSIE Report for Art Museum Education” (2010), she recognizes their effort to give art museum educators comparable tools to those used by their science museum counterparts, namely setting clear and measurable goals for learning in their particular setting. However, she considers that to be a misleading path:

An art museum visit is an experience. It can be tamed and structured into a lesson-based teaching opportunity, a format that may feel comfortable and measurable to educators. However, when such museum lessons are constructed, I believe an opportunity – one that is both more valuable and harder to quantify – has been lost. Though I am not a science educator, I can imagine that a similar issue might exist in the field of science museum education. (Duke 2010: 272)

Her compelling argument is based on a simple premise: 'A Museum Visit isn't a Lesson, it's an Experience'; and so, when museums measure learning based on expected formal outcomes, they are embarking on a misguided quest (Duke 2010: 277). Duke lists some key concepts that help us acknowledge the importance of this distinction, as presented below:

Firstly, people can learn how to learn from experiences, and museums can help visitors cultivate their abilities to learn from what the museum has on display. Secondly, learning from an experience is a deeply personal process that needs to be structured by the individual 'rather than jumping through hoops that have been pre-arranged' (Duke 2010: 272). And thus, museums should design learning experiences, as opposed to structured visual and material lessons. Thirdly, aesthetic experiences are especially valuable for individual growth because they escape from the right/wrong, true/false paradigms (Duke 2010: 272).

Although her piece focuses mainly on the value of aesthetic experiences that art museums can provide, she considers that her argument is equally valid in other museum settings, as:

In both science and art, the ability to learn from material objects is key. This is perhaps the most potentially exciting shared ground for educators of science and art, as well as for museums of any sort. Traditional cultures have always understood that people can learn from experiences with man-made and natural objects, not just from words. In a contemporary society that more often thinks in terms of using, consuming, or owning things, thoughtful encounters with the material world can open doors to a new relationship with nature, with each other, and with ourselves. Science and art museum educators can create situations in which visitors structure their own inquiries with objects. Mental 'muscle' developed from self-structuring can be applied later in any arena of life. (Duke 2010: 277)

In our opinion, this repositioning of museum learning as a deeply experiential, deeply personal phenomenon is particularly valid when we think of the ways adult visitors approach and find meaning in museums, and how they use that meaning making process in the negotiation of their own identities. Chapters Five and Six of this thesis will demonstrate this point with reference to Portuguese Case Studies in the Museu do Trabalho Michel Giacometti and in the Núcleo Museológico de Alverca.



### 2.3. Museums and Identity

In the Museum Studies literature the term *identity*<sup>29</sup> has often been used in relation to grand constructs, such as ‘nation’ (Kaplan 1994; Holo 1999; Reid 2002; Aronsson & Elgenius 2011; Carrier 2012; Coombes 2012; Macdonald 2012); ‘particular communities’ (O’Neill 2006a; Holtschneider 2011; Watson 2007); *race* (Faden 2007; Golding 2009; Brooms 2011); ‘gender and sexuality’ (Sandell 2006; Levin 2010; Golding 2013; Anderson & Winkworth 2014); and the ‘museum’s brand’ identity itself (McClean 1998; Anderson 2000; Pusa & Uusitalo 2014). Also, in recent years, there has been a rising crescent research interest into the pressing issue of ‘migration’ and the negotiation of identity in European museums (Lloyd 2014; Whitehead, Mason, Eckersley & Lloyd 2015; Parby 2015).

Throughout this thesis, the subject of *identity* is positioned in terms of what Rounds (2006) framed as the individual’s ‘identity work’, i.e., ‘the process through which we construct, maintain, and adapt our sense of personal identity, and persuade other people to believe in that identity.’ (Rounds 2006: 133). Concurrently, the thesis is less interested in the debate that looks at identity as a variable for the outcome of a particular museum visit (Falk 2006, 2009), or whether visitor studies can predict museum visits based on broad-brush identity types.

Looking at the debate over the difficulty in transmitting the museum’s learning message, and the frustration amongst some museum practitioners and academics concerning the lack of attention museum visitors generally pay to the displays (browsing behaviour), Rounds offers an alternative view:

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<sup>29</sup> An online search on the University of Leicester’s Library using the terms ‘identity in museums’ revealed an overwhelming number of 3.878 occurrences. Of those, many did not have either of the terms in the title, but the terms had been used either in the Table of Contents, or in the subject details. However, many were repeated occurrences. [Search done on the 09.08.2016]

Rather than starting from the question “How can we get visitors to do a better job of learning?” I start by asking, “why do visitors spend so much time learning things that they don’t really need to know? What might they be up for which browsing would be an intelligent strategy? (Rounds 2006: 134)

Thinking of identity as an ongoing individual process, encapsulated in the term ‘identity work’, we turn to some useful definitions. The Penguin Dictionary of Sociology states that *identity* is ‘the sense of self, of personhood, of what kind of person one is.’ And stresses that identities are not fixed nor given: ‘sociologists [...] argue that identities are fluid and changeable and that we can acquire new ones’ (Abercrombie, Hill & Turner 2006: 190). As for *The Concise Oxford Dictionary of Sociology*, it offers us a more detailed and historiographic account of how the concept of identity came to be used in different academic fields:

Although the term identity has a long history – deriving from the Latin root *idem* implying sameness and continuity – it was not until the twentieth century that the term came into popular usage. Discussions on identity take two major forms – psychodynamic and sociological. The psychodynamic tradition emerges with Freud’s theory of identification, through which the child comes to assimilate (or introject) external persons or objects, usually the superego of the parent. [...] The psycho-historian Erik Erikson saw identity as a process ‘located’ in the core of the individual, and yet also in the core of his or her communal culture, hence making a connection between community and individual. [...] The sociological tradition of identity theory is linked to symbolic interactionism and emerges from the pragmatic theory of the self discussed by William James and George Herbert Mead. [...] There is, therefore, no clear concept of identity in modern sociology. It is used widely and loosely in reference to one’s sense of self, and one’s feelings and ideas about oneself [...] it is elsewhere assumed that we construct

our identities more actively out of the materials presented to us during socialization, or in our various roles. (Marshall 1994: 232-233)

Giddens (1991) offers some additional clarification by stating that our sense of identity, our self-identity is a reflexive endeavour which:

[...] is not something that is given, as a result of the continuities of the individual's action-system, but something that has to be routinely created and sustained in the reflexive activities of the individual. (Giddens 1991: 52)

Furthermore, and completely in tune with what this thesis came to recognise, Giddens adds that 'self-identity is not a distinctive trait, or even a collection of attributes, possessed by the individual. It is the self as reflexively understood by the person concerning her or his biography.' (Giddens 1991: 53) Therefore, identity should not be seen as a fixed, defined and definitive condition externally imposed on individuals, but it identifies a continuous process of *self*-construction [author's emphasis]. As Giddens reminded us :

the self is not a passive entity, determined by external influences; in forging their self-identities, no matter how local their specific contexts of action, individuals contribute to and directly promote social influences that are global in their consequences and implications. (Giddens 1991:2)

Continuing to deepen our analysis of the concept of identity and the self's identity work, we turn to the discussion of the cultural historian Jerrold Seigel. In his comprehensive work about the intellectual history of the *Idea of the Self*, Seigel starts, not surprisingly, by recognising the difficulty of encapsulating the notion of self in Modern and Contemporary Western philosophy:

Few ideas are both as weighty and as slippery as the notion of the self. By “self” we commonly mean the particular being any person is, whatever it is about each of us that distinguishes you or me from others, draws the parts of our existence together, persists through changes, or opens the way to becoming who we might or should be. [...] Hence the nature and meaning of selfhood have been recurring questions, implicitly or explicitly, in practically every known human time and place. Nowhere has the debate been more full-blown or more intense than in the modern West, the locale in which individuality has been both most fervently celebrated and most ardently denounced. (Seigel 2005: 3)

However, contrary to the postmodern tradition (particularly among French authors, such as Michel Foucault, Roland Barthes, and Jacques Derrida), which questions the mere notion of selfhood, or proclaims its fragmentation, Seigel acknowledges its fundamental dimension in Western Thought for over four centuries. Starting from Descartes and Locke, he proposes a three-fold approach to the concept of selfhood: Firstly, he points to the ‘bodily or material self’, involving ‘the physical, corporeal existence of individuals [...] housed in our bodies, and [...] shaped by the body’s needs’ (Seigel 2005: 5); secondly, he observes the ‘relational or social self’, which ‘arises from social and cultural interaction, the common connections and involvements that give us collective identities [...] in this perspective our selves are what our relation with society and with other shape us to be’ (Seigel 2005: 5). Finally, Seigel emphasises the ‘reflective<sup>30</sup> self’, that ‘derives from the human capacity to make both the world and our own existence objects of our active regard [...] on this level the self is an active agent of its own realization, establishing order among its attitudes and beliefs, and giving direction to its actions’ (Seigel 2005: 5-6).

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<sup>30</sup> Reflective, not to be confounded with reflexive, which despite appearances, has an almost opposite meaning in its origin: ‘A “reflex” is an automatic or involuntary action, an uncontrolled response to a stimulus. In this sense, something is reflexive if it simply doubles or reinforces its origin’ (Seigel 2005 12).

The central argument of this thesis which we will explore in Chapter Five, uses this third categorisation of the self, in which individuals reflectively construct, maintain and communicate what they recognise as their selfhood, or in the words of Rounds, do their ‘identity work’<sup>31</sup>.

By mapping the relevant literature concerning the ample notion of museum experiences and how those can act to shape our self-identities we have tried to lay the theoretical background that will underpin the later analysis of our research data. Among the several reviewed contributions to the subject we emphasise the importance of Paulo Freire to this thesis for allowing us to look critically at dynamics between individuals and institutions, and also for stressing how learning can lead to an individual’s true empowerment, through the process of conscientisation and the transformative potential of that ‘new consciousness’. These ideas are particularly infused in this thesis research design, as we will demonstrate in Chapter Four, but are also debated in relation to this thesis findings presented on Chapter Five and Six. Additionally, we stress Falk & Dierking (1992) contribution to the shaping of what constitutes a museum experience and Hein’s (1991) contribution to the debate regarding museum learning experiences. Finally, we highlight the importance of Rounds (2006), who provided this thesis central concept: ‘identity work’. The idea of how an individual can use the museum to ‘construct, maintain and adapt’ her/his sense of personal identity became pivotal to this work as we will demonstrate in Chapter Five (Rounds 2006: 133).

Next, we will look at the contextual research scenario for this research, presenting a brief overview of the Portuguese museological system, the main theoretical paradigms that have influenced it, and we will finish focusing on the specificities of Portuguese Local Museums.

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<sup>31</sup> The expression ‘identity work’ was brought to the museum studies literature by Rounds, however it was initially coined by the sociologist Judith A. Howard in a 2000 paper on Social Psychology of Identities (Howard 2000: 382).

## **Chapter Three: Portuguese Local Museums – contextual scenario for the research study**

### **3.0. Preamble**

This Chapter presents the contextual scenario for our research. It addresses the historical grounds of Portuguese museology; it presents the main theoretical threads that have marked the country's museology in the last 40 years; it proceeds looking at the main theoretical contributions relating to the subject of museum communities and it concludes with a reflexion on these themes collected during this thesis research made by museum practitioners at the case study museums.

### **3.1. Portuguese Museums – historical contingencies and contemporary condition**

#### **3.1.1. The early days of Democracy (1974-1990) – Ecomuseums and New Museology as major theoretical frameworks**

Pimentel (2005) and Anico (2008) trace the specificities of the Portuguese Museological System to the mid-nineteenth century (Pimentel 2005, Anico 2008), however the pertinence to the subject we have been addressing, calls for an analysis starting on the outset of the Portuguese democratic revolution, historically known as the 'Carnation Revolution' of April 1974. From 1974 to 1985<sup>32</sup>, several new museums managed by local government appeared throughout the country, either by the reformulation of previous museological projects, or by the construction of new institutions<sup>33</sup>.

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<sup>32</sup> 1985 - year of the n°13/85 Law which regulates the general framework for the Portuguese Cultural Heritage, only to be revoked in 2001: [http://www.igf.min-financas.pt/Leggeraldocs/LEI\\_013\\_85.htm](http://www.igf.min-financas.pt/Leggeraldocs/LEI_013_85.htm)

<sup>33</sup> Two of those new museums adopted the suffix 'Eco', clearly stating the museological framework in which they would operate: Ecomuseu do Seixal and Ecomuseu de Alcochete in Nabais (1984)

According to the Portuguese researcher Marta Anico, the reconfiguration of the local museumscape, during this period, is strongly connected with the promulgation of democratic legislation empowering local administration<sup>34</sup> and ‘born out of the generalised perception regarding the need to assert local and regional identities’ (Anico 2008: 141). Among researchers there has been a consensus that, from 1978, with the first attempt to create an ecomuseum in Portugal<sup>35</sup>, up to 1990’, the majority of the new museums were born, or restructured, under the influence of the *Nouvelle Museologie* (Pimentel 2005: 165, Primo 2006: 43, Camacho 2006, Nabais 1984).

However, according to Cristina Pimentel (Pimentel 2005), one should resist the temptation to acknowledge this new trend in museological initiatives, which spread throughout the country particularly after 1980 (Primo 2006: 44), as a phenomenon completely underpinned by the revolutionary ideology. On the contrary, Pimentel argues that the model of the ecomuseum should be understood as continuity with the socio-economical and cultural structures of the previous Portuguese corporative state:

This relationship allows for the understanding of the concept of ecomuseum as a historical and structural heir of the cultural and social organizational guidelines characteristic of the corporative experiences and, thus, clarifies for what reason the Portuguese museological system, after 1974, would be so rapidly tuned with the principles postulated by Hugues de Varine and George Henri Rivière. (Pimentel 2005: 156 [our translation])

Thus, Pimentel proposes that, in those early days of the Portuguese democratic regime, these new museological institutions became the surrogates for the extinct *Casas do Povo*, which traditionally acted as

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<sup>34</sup> Lei n° 79/1977 (October the 25th)

<sup>35</sup> The first attempt to establish an Ecomuseum in Portugal occurs in 1978 with the project Ecomuseu do Parque Natural da Serra da Estrela, deeply influenced by the French ecomuseum experiences, such as the National Park of Landes de Gascogne, which never comes to completion due not only to the non-commitment of the Central Government, but also to a lack of interest of the surrounding communities (Pimentel 2005: 183).

‘centres of social, cultural and sports development in rural areas’, while simultaneously incorporated the modern principles of ‘ecomuseology’ (Pimentel 2005: 165). For the Portuguese museologist:

The evolution of the ecomuseology movement, in Portugal, should be read as an attempt to modernize the museological aspirations of some of the corporative institutions of the country, following socialist ideas, and according to the principles of popular association, so vigorously stimulated in some of our country’s regions. (Pimentel 2005: 186 [our translation])

Interestingly, this link between the 1970’ *Ecomuseology* and the remains of a deeply corporative state is not unique to Portugal. In Pimentel’s view, the very origins of French Ecomuseology can be traced to G. H. Rivière’s work during the *Vichy* years at the *Musée Nationale des Arts et Traditions Populaires*<sup>36</sup>. At the time a perfect portrait of a rural and anachronic utopia, so familiar to Pétain’s *Revolution Nationale* (Pimentel 2005: 168). Nevertheless, regardless of this corporative undertone, the new museological initiatives being developed in Portugal, in those early days of democracy, were concurrently influenced by pivotal documents that expressed *l’air du temp*. Those documents were of paramount importance for the development of the New Museology international movement (Primo 2007a, Pimentel 2005: 187). The first of which was the *Santiago do Chile Declaration*, in 1972, introducing the idea of a museum as an agent for community development:

The museum is an institution in the service of society of which it forms an inseparable part and, of its very nature, contains the elements which enable it to help in moulding the consciousness of the communities it serves, through which it can stimulate those communities to action by projecting forward its historical activities so that they culminate in the presentation of contemporary problems ... (*Santiago Round Table Declaration*, 1972)

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<sup>36</sup> Pimentel quotes Christian Fuare’s work *Le projet Culturel de Vichy, Folklore et Révolution Nationale – 1940-1944* in order to fundament her thesis.



*The Quebec Declaration* (1984) was the second document to have a deep impact, not only in the new Portuguese museology, but also internationally. According to Pimentel, both documents would ‘constitute the ideological and discursive grounds on top of which a new non-governmental organization would be launched’, the MINON (*Mouvement Internationale pour la Museologie Nouvelle*) (Pimentel 2005: 187-188). Again, in the words of Pimentel, this international Movement would become:

[...] a catalysing element during the long restructuration process of the Portuguese museological system, particularly in the process of restructuring of the small local museums, in tune with the socialist concerns of the democratisation process. (Pimentel 2005: 188 [our translation])

So, in just over a decade<sup>37</sup>, the small, underfunded, peripheral, local museums, traditionally concerned with their own ethnographical and, even folkloric collections, and the new museological projects being born from North to South of the country, began to perceive themselves as agents for community development, and that their museological practices should be developed with, and for the local population (Pimentel 2005: 192, Primo 2006: 42). Concurrently, according to museologist Judite Primo, these local museums have brought a new dynamic to the Portuguese museology, amplifying the debate around concepts such as heritage and its communication, and bringing up front new solutions to the re-engagement with historical sites, monuments and collections (Primo 2007: 78). The conclusions of the general Inquiry launched to Portuguese museums, by the end of 1990’, would state that:

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<sup>37</sup> It is important also to acknowledge the work done by the Department of Ethnology of IPPC, a government institute for Cultural Heritage, lead by Henrique Coutinho Gouveia who inspired through a series of workshops and lectures a new generation of local museum practitioners (Pimentel, 2005: 191-192)

[...] the unprecedented increment in the establishment of museums after the 25<sup>th</sup> of April 1974' Revolution represented also the significant amplification of the heritage concepts and, in that context, the valorisation of collection so far unnoticed. In a time of swift and profound change, this task was, mostly, developed by the municipal power, that only then was assumed as such, exposing the need to assert local and regional identities and connecting a considerable number of players<sup>38</sup>. (*Inquérito aos Museus em Portugal* 2000: 14 [our translation])

In sum, from 1974 throughout the 1980s and up until 1990s, the New Museology paradigm, combined with the particular and historical dynamics of the Portuguese museological system, would be the discursive and effective grounds for the locally managed Portuguese museums to develop. This paradigm would be particularly influent among the museological projects managed by local authority as a tool to do identity work in the midst of rapidly changing communities.

However, another major historical fact was to play an enormous transformative effect, bearing consequences into the rearrangement of the country's cultural policy. The Portuguese entry in the CEE, decided in 1977<sup>39</sup> and consummated in 1986, would dramatically change the nation's political, economical, social and cultural spheres.

### 3.1.2. The end of the Century and the bureaucratic reorganization of the Portuguese museumscape (1990-2000)

In order to better comprehend the scope of the transformation of the Portuguese museums, a brief historical context is required. In the 1970s, Portugal was a country scoring poorly in all the major social development markers. With high child mortality rates<sup>40</sup>, and low formal educational

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<sup>38</sup> Such as local stakeholders, national museological structures, etc...

<sup>39</sup> 28th of March 1977 marks the formal submission to the CEE

<sup>40</sup> Vide Pinto (1994: 302)

rates<sup>41</sup>, it was still a highly underdeveloped country, especially in its rural areas.

The ‘Carnation Revolution’ of 1974 would put an end to more than forty years of an authoritative and anachronistic regime, which, particularly after WWII, had lost track with the new geopolitical order, and had dragged Portugal into a socially painful, economically disastrous, and politically indefensible war with its colonies for almost 15 years<sup>42</sup>.

Thus, from the outset of the democratic regime, there was a strong political consensus<sup>43</sup> that the solution to the Portuguese embarrassing underdevelopment was to be found in Europe. The historian and economist, Sousa Franco, promptly classified this belief as the ‘new expansionist myth’, replacing the long held mythology of Portugal as the leader of a transatlantic empire, now lost (Sousa Franco 1994: 258). Portugal was to reinvent itself as a *European* nation.

Hence, from 1986 onwards, Portugal was able to implement – thanks to the unprecedented financial aid that the country received from its European partners – a series of reforms, such as, the rehabilitation of the country’s infrastructures, and the modernization of its financial and fiscal systems (Sousa Franco 1994: 271), opening the Portuguese market to the global economy, and simultaneously, improving social well-being indicators<sup>44</sup>.

This reformist dynamic, and the need to reorganise the country’s cultural policy, would materialize, as far as museums are concerned, in the

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<sup>41</sup> Vide Marçal Grilo (1994: 410) & Barreto (1996)

<sup>42</sup> The war starts in Angola in 1961 and rapidly spread to two other Portuguese colonies, Mozambique and Guine Bissau.

<sup>43</sup> Aside from the Communist party, and other minority left wing parties, which were categorically against the country’s adhesion to the CEE.

<sup>44</sup> For instance, the average life expectancy for women increased from 70,8 to 78,7, from 1970 to 1997.

establishment of the *Instituto Português de Museus* (IPM)<sup>45</sup>, which originally set out to manage the museums directly dependent of the Ministry of Culture<sup>46</sup>, and also to manage ‘the multiple specific problems of the [museumological] sector’. The legislator believed that the ‘museums’ management should be trusted to an organism exclusively dedicated to it and ‘with its own administrative competences.’ [our translation]<sup>47</sup>

However, this new institute would initially struggle, not only, with the complexity of the Portuguese museumological system (Pimentel 2005: 214), but also, with the government’s relative lack of interest (Anico 2008: 142). Change would only be significant after IPM’s reorganisation in 1997<sup>48</sup>, when it began to work on the development of a new museumological policy, through the design of the legal framework for the restructuring of the Portuguese museumological system. Concurrently, it aimed for a better articulation between local museumological initiatives and centrally governed museums. (Anico 2008: 143)

It is important to stress that in October 1995, a new socialist government was elected – the XIII Constitutional Government – setting forward a new cultural policy based on five general principles: Democratisation (of the access to cultural practices); Decentralisation (through the cooperation between central government and local cultural agents); Internationalisation (promoting Portuguese culture abroad); Professionalisation (improving levels of proficiency among cultural employment); and Institutional Restructuring (new or re-launched public institutes with new competencies) (Primo 2007: 88).

This Governmental Programme assumed the necessity of enhancing two dimensions of the cultural policy: the sector’s professionalisation, and the need to attract new audiences. It recognised that culture’s role in a

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<sup>45</sup> Decreto-Lei n° 278/91 (August the 9th)

<sup>46</sup> At the time, 31 museumological institutions.

<sup>47</sup> Decreto-Lei n° 278/91 (August the 9th)

<sup>48</sup> Decreto-Lei n° 161/97 (June the 26th).

balanced development called for a greater proficiency of the cultural mediators and agents, creators and artists. In what concerned the capture of new audiences, it was assumed the need to promote several actions: development of the network of school libraries; the establishment of a national educational and recreational centres' network; [...] and through the available new technologies to promote citizens' access to culture. (Primo 2008: 89 [our translation])

In this spirit, one of the new IPM's first initiatives was the launching of a formal inquiry among all the museological institutions spread throughout the territory, aiming to obtain a 'rigorous knowledge of the national museological reality and the census of the pertaining institutions, through analytical parameters based on up to date museological concepts.'<sup>49</sup> [Our translation] This inquiry was to serve as basis for the intended *Rede Portuguesa de Museus* – the Portuguese Museums Network, and it brought no surprises:

For those who work in the museums field [...] the results obtained seem to translate, immediately, the strong impression of recognition. Regarding the accentuated 'youth' of the majority of the museums; their uneven geographical distribution, that goes together with the country's demographic, economic and cultural asymmetries; the diversity of the majority of the collections and the multiplicity of governing bodies, this Inquiry clarifies what we already knew. It also confirms that Portuguese museums, overall, struggle with difficulties and several constraints, namely, the scarcity of qualified human resources [...] and the lack of a budget and of visitors oriented programs and activities. (*Inquérito aos Museus em Portugal* 2000: 12 [our translation])

The Inquiry confirmed that, by the end of the century, Portugal had a complex, highly diverse and, many times, precarious museumscape. It also recognized that, within that museumscape, some of the locally managed museological initiatives were among the most promising projects:

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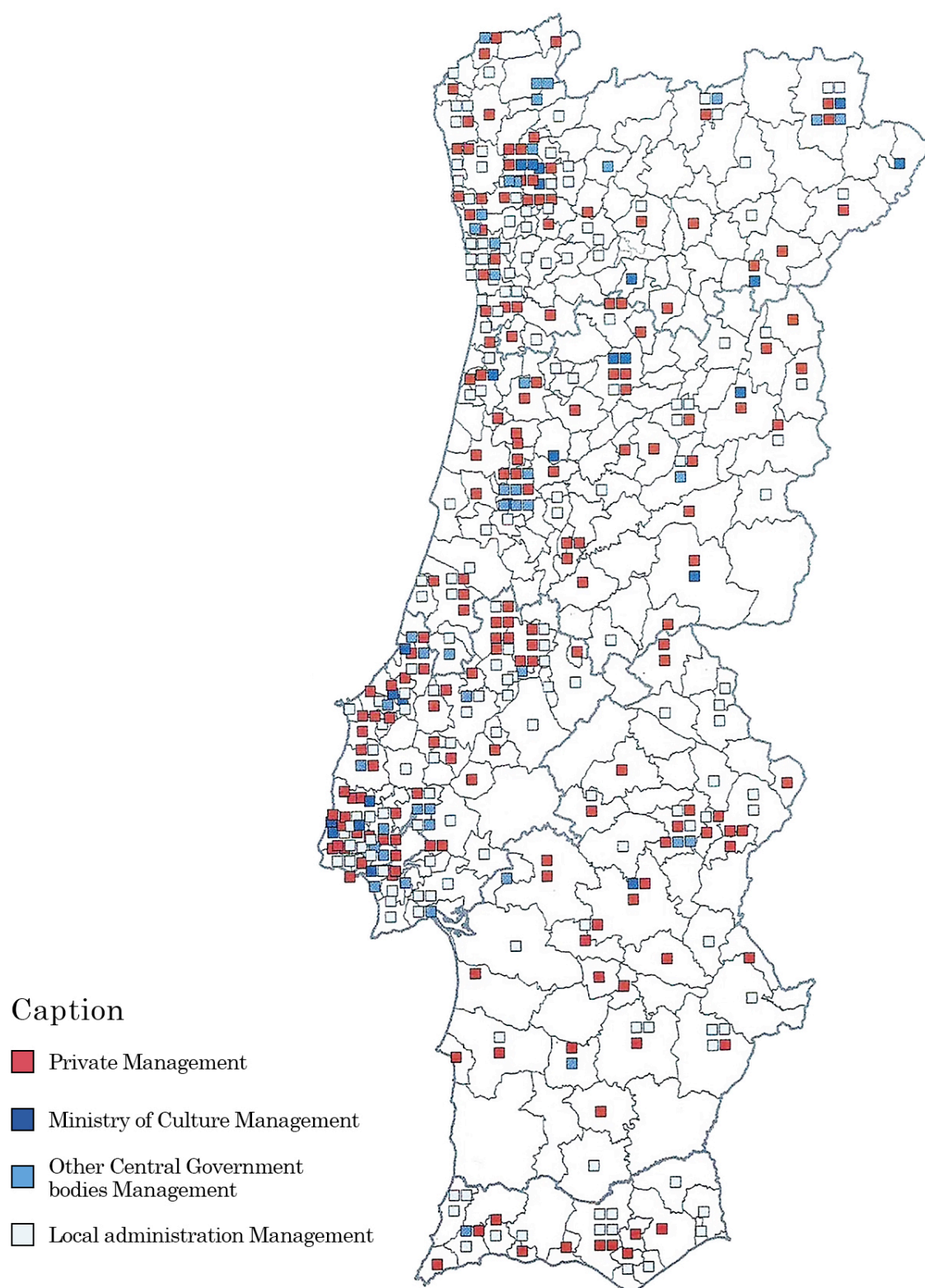
<sup>49</sup> In *Inquérito aos Museus em Portugal*, 2000: 11

[...] the vast universe of the municipally managed museums contains very dissimilar cases, generally marked by shortcomings, but also others, although less numerous, that are confirmed among the most promising examples of the Portuguese museology, especially in the generally privileged region of Lisboa e Vale do Tejo and, to a less percentage extend, the Northern region. (*Inquérito aos Museus em Portugal 2000*: 13 [our translation])

Overall, by the year 2000, Portugal had approximately 152 institutions matching the Inquiry's minimal criteria in order to be considered a museum<sup>50</sup>. This in a universe of 530 organisations allegedly called museums, which voluntarily answered to the Inquiry. However, the most significant fact is that of those 152 institutions only 50 museums were able to fulfil all the enunciated criteria: the existence of an inventory; a definitive physical venue; at least one space/room totally dedicated to exhibitions; the existence of other dedicated spaces; permanent staff; at least one professionally qualified senior employee ('*Conservador*', or other graduated professional); the existence of technical services; the existence of a security system; being open throughout the year; functioning educational services; visitors' venues (such as cafeteria/shop/Library); own budget; marketing services/communication system; publications and/or museum leaflets (*Inquérito aos Museus em Portugal 2000*: 12-13 and 159).

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<sup>50</sup> The Inquiry does not include the museums created between the years of 1999 and 2000.



**Figure 5 - Portuguese continental Museums according to management (adapted from *Inquérito aos Museus Portugueses 2000*: 45)**

### 3.1.3. The new millennium and the call for new museum standards (2000-2013)

As previously mentioned, triggering this Inquiry into Portuguese Museums was the firm intention to create a supporting institutional structure that would act as an agent for museum development in the years to come. IPM's 1997 new legal framework, along with its own restructuring, conveyed already the constitution of a Portuguese Museological Network – *Rede Portuguesa de Museus*<sup>51</sup>. It first appeared as a three years' provisional structure – *Estrutura de Projecto Rede Portuguesa de Museus*<sup>52</sup>, and when it finally started operating, in 2003, included 120 adherent museums, with diversified governing bodies: 28 museums pertaining to IPM management; 6 museums governed by central administration; 14 administered by regional authorities<sup>53</sup>; 50 ruled by local administration; 20 with private management and 2 managed by public companies (Anico 2008: 143).

The Portuguese Museological Network's intentions and programmatic lines were presented in an inaugural document:

It is a mediating and articulating system between museological entities aiming for the promotion of communication and cooperation leading to the qualification of the Portuguese museological reality. (Camacho et al. 2001: 32 [our translation])

This document also serves as a contextual validation for the necessity of a museological network. As stated by the authors, there were several arguments for the network: Firstly, the so called 'museological explosion, or a significant increase of the number of museological institutions (be it coherent projects, or it other experiences that used the name *museum*). Many of these initiatives had been born under the scope of municipal

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<sup>51</sup> The final formalisation of the RPM – Rede Portuguesa de Museus – was only passed into law on the 17th of May 2000 (Despacho Conjunto nº616/2000)

<sup>52</sup> Created by the law: Decreto - Lei nº 398/99 (October 13th)

<sup>53</sup> Museums administered by Regional Authorities in Azores and Madeira.



authority after 1974 and they ‘were inscribed in the framework of cultural democracy and in the assertion of local and regional identities’ (Camacho et.al. 2001: 22), and had also allowed for a repositioning of the museological debate on its communities, rather than on the collections themselves, it had broadened the scope of museological objects, it had arranged for the preservation *in situ* of several heritage sites, and, concurrently, allowed for museum’s geographical decentralization (Camacho et.al 2001: 22). However, this increase in the number of museological projects had also given place to ‘cases of uncontrollable spontaneity, with less technical proficiency and ignoring normative procedures’ (Camacho et al. 2001: 23). Nevertheless, it is their view that this:

[...] *museological outburst*, albeit complex, is the reflex of an enlarged notion of heritage, of the communities’ dynamics, of the museums’ plurality of origins and identities, and of its rich variety in the Portuguese cultural mosaic. Being one of the greatest cultural achievements of the end of the century. (Camacho et al. 2001: 23 [our translation])

Camacho et al. further note the feeble articulation between the national museological and heritage institutions and the *pleiade* of individual museums, which had been operating without any relevant central government support. The absence of a legal framework regarding the creation of new museums is another major concern.

Nevertheless, a new period in the Portuguese museology (revealed by the 1999 *Inquiry*) pointed towards a ‘more rigorous and more mature phase, making us believe that in the medium term a growing number of institutions will be involved in a modernisation dynamic’ (Camacho et.al 2001: 25 [Our translation]). Additionally, the 1999 *Inquiry* had shown that the museums created in the last five years had better evaluations in all the enunciated criteria (*Inquérito ao Museus em Portugal* 2000: 15).

Alongside these arguments, the document also presented a ‘swot analysis’ of the critical points and strengths facing contemporary Portuguese museology. On the critical aspects it notes: the multiplicity of governing bodies translating into the disparate resources available to museums (technical, scientific, financial); the weak influence of regional museological initiatives, making it difficult to connect museums sharing geographical areas of influence; the feeble technical proficiency of the majority of the museums human resources, and the difficulties in establishing accessible training programs; and, finally, the poor articulation between national, regional and local museological scales.

As for the strengths, it notes the invigorating dynamism of some local museums which managed to establish strong ties with their surrounding communities; the new museological typologies that reflect the ‘valorisation and the interpretation’ of the particular heritage that each community chose to embrace; professionally, as an opportunity, it mentions the new generation of museum professionals, highly trained, alongside the research work being done at the universities; finally, a reference to the possibilities brought by the III QCA – the European Union financial support for the years 2000-2006. (Camacho *et al.* 2001: 31-32)

Thus, the network is presented as a support structure developed with three underlying principles: Firstly, the articulation and communication between museological entities ‘through the systematic sharing of information’; secondly, the cooperation and partaking, through the development of common projects, and by modes of sharing technical and scientific expertise; and thirdly, flexible and transversal articulation avoiding the crystallisation of models. (Camacho *et al.* 2001: 35)

These principles, opposing an uniformisation of the museological discourses concerning heritage, favour those that promote regional and

local identities, and that contribute, communicate, and enhance the country's cultural diversity (Camacho *et al.* 2001: 35 [our translation]).

Again, we can recognise the influence of the local museological initiatives in the shaping of the Portuguese museological debate. According to Marta Anico, the dynamism of the Portuguese local museology is in closely connected with the political cycles of the local authorities:

Generally, local museums benefit from municipal management and financing and are, always, referred in the electoral programs of the municipal candidates, as well as in the municipal general programmes (*Planos Diretores Municipais*), under the label of cultural equipment at the service of the communities, shaped as displays of the local, thus contributing to the visibility and ascertainment of the political powers and of the territories (Anico 2008: 147 [our translation]).

Concurrently, the RPM would also promote a qualification program, through the issuing of the network credentials, 'aiming to promote museums' 'good practices' and enhancing their technical skills towards a better social performance' (Camacho *et al.* 2001: 52 [our translation]).

By 2005, there were already signs of a general tendency towards museums' qualification (Anico 2008: 145), and all the museological system was benefiting, not only, from the networks' success, but also, from the legal clarification brought by the 2004 Museums' General Law – *Lei-Quadro dos Museus Portugueses*<sup>54</sup> – a framework for the Portuguese Museums, putting an end to 30 years of legal un-definition and sparse legislation. 'The law is the first document exclusively dedicated to the definition of a national museological policy' (Anico 2008: 143 [our translation]).

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<sup>54</sup> Law n° 47/2004 (August 19th)

Thus, the Portuguese museumscape knew an increasingly refinement of the museological standards throughout the first decade of the new century. This was achieved, not only, by a series of legal and institutional rearrangements, but also, by the emergence of a 'critical mass' among the Portuguese museologists and museum practitioners, tended by the Portuguese Museological Network. The two official reports issued between 2005 and 2013, *O Panorama Museológico em Portugal / The Portuguese Museumscape*, served as a final confirmation of all the changes undertaken.

#### 3.1.4. Portuguese museums in numbers

The reports looked at the Portuguese museumscape from the years 2000 to 2009, covering most of the first decade of the Portuguese Museum Network (RPM) activity. Their authors were particularly interested in observing the continuities and alterations brought up by the concretisation of the new legal museological framework (Neves et al. (ed.) 2013:15). So, these studies confirm a general increase in museum numbers, tendency that had started in the 1990 and that persisted in the 2000, particularly in the local museums category (Neves et al. (eds.) 2013:45).

From 2000 to 2009, 135 new museums were created (491 to 626) of which 78,5% had local governance, which constitutes a paramount evidence of the dynamism of the local museological sector of that decade. In total numbers, by 2009, 48,6% of the Portuguese museums were run by municipal councils, or municipal companies. (Neves et al. (eds.) 2013:46)

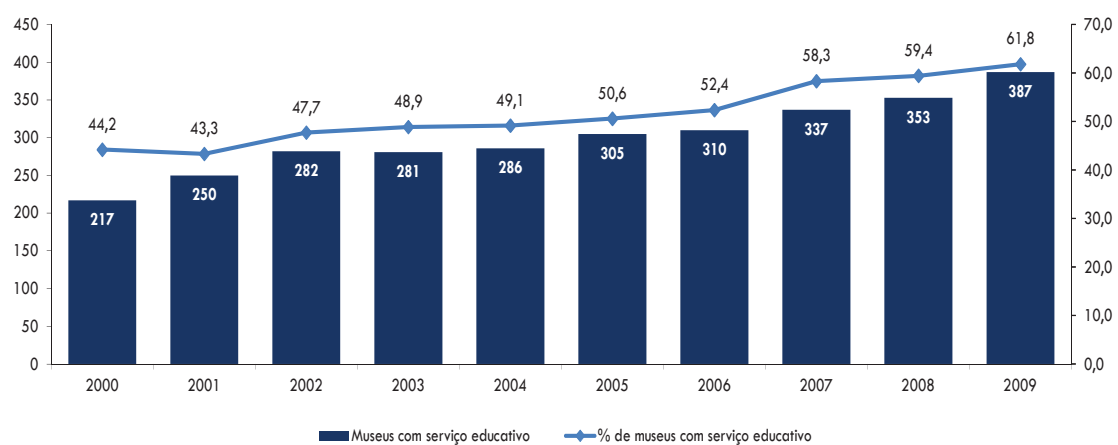
Confirming the cited earlier 'museum explosion', is the number of museums that opened their doors between 2000 and 2009: 32% of the museums operating in Portugal by 2009 had been created during that decade (Neves et al. (eds.) 2013: 46). Nevertheless, from the total number

of 626 museums operating in the continent and islands, only 146 of them have the RPM's accreditation<sup>55</sup>.

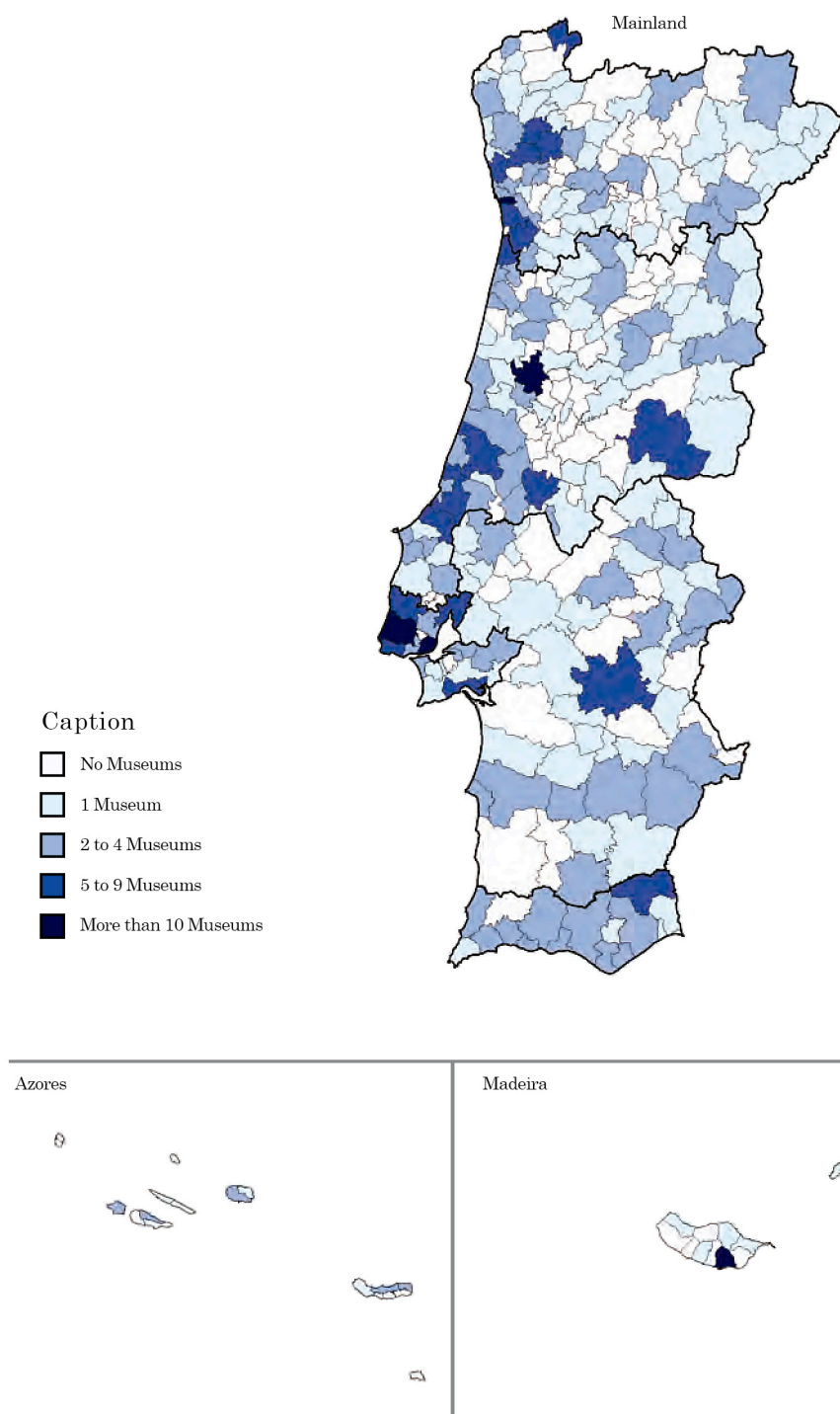
However, by 2009 a significant regional asymmetry persisted with 72,6% of the Portuguese museums being located in the North, Centre and Lisbon areas: 26,2% in the North; 27,2% in the Centre and 19,2% in the Greater Lisbon Area (Neves et al. (eds.) 2013:46). The 2013 report additionally notes a significant increase in the museum staff numbers (in 2000 only 69% of the museums had permanent staff and by 2009 the number had risen to 83%) and of their professional and academic qualifications (Neves et al. (eds.) 2013: 56). As for their technical procedures and physical conditions, the report notes a boost in the digitalisation of the inventories (Neves et al. (eds.) 2013: 70) and a rise in the number of museums with definitive buildings (from 85,5% in 2000 to 92% in 2010) (Neves et al. (eds.) 2013: 72); also, the number of museums with a separate room for its educational department also rose from 25,7% in 2000 to 38,6% in 2007 (no data for 2009) (Neves et al. (eds.) 2013: 81).

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<sup>55</sup> A complete list of the museums accredited by the network is available at <http://www.patrimoniocultural.pt/pt/museus-e-monumentos/rede-portuguesa/>



**Figure 6 - Museums with Educational Service variation: total number and percentage**  
(Neves et al. (eds.) 2013: 81)



**Figure 7 - Museums by municipality (2009) (adapted from Neves et al. (eds.) 2013: 49)**

However, the 2013 report also refers to the beginning of a new cycle caused by the financial crisis of 2008. While the complete consequences were yet to be fully identified, the first signs could be found ‘in the strong containment of investments and operating costs, in the [available] organizational means and in the financing of activities’ (Neves et al. (eds.) 2013: 21).



## 3. 2. Museums and their Communities

### 3.2.1. Museums' Communities – unpicking the concept

Before advancing further, it is important to look into the recent theorisation behind the concept of *museum communities*. Briefly exploring what may constitutes a museum's community(ies), and unpacking a concept that can be naively seen as straightforward and uncontentious.

In the New Museology's terminology, community refers to the 'people residing in one territory having the same cultural identity, values, traditions and socio economic needs' (Dutta 2010: 15). However, apart from rare isolated hamlets, in our contemporary world any given territorially bound group of people can belong and participate in different groups, assuming concurrently diverse identities. Thus, when Elizabeth Crooke started to address the issue of museum communities she began by recognising its challenging diversity:

Those who interpret museums are also diverse: men and women, majority and minority groups, able, disabled, academics, curators, visitors, non-visitors, adults, children. The people within these groups will also differ from each other, they will have widely divergent views, and each person will have a very personal sense of self and identity. It is this myriad that constitutes the museum's public; it is from this diversity that the museum must find its role, be relevant and seek value. (Crooke 2007: 1)

Moving forward, when Sheila Watson addressed the issue of museums' communities she started by unpicking the term of *community* itself, recognising its elusiveness and vagueness, but at the same time, agreeing on an operative definition: 'community is the sense of belonging that comes to those who are part of it [...] and that, through

association with communities, individuals conceptualise identities.’ (Kavanagh 1990 & Woodward quoted in Watson 2007: 3). Watson also proposed that communities are self-determined and that an individuals’ path throughout her/his life can lead him/her to belong, or to be perceived as belonging, to varied communities (Watson 2007: 4).

Extending Mason’s previous formulation for ‘the concept of interpretive communities’ (Mason 2005: 206-207), Watson recognises seven ways communities can be perceived. Firstly, she points to how communities are ‘defined by shared historical or cultural experience’. In this case, museums play a role in helping the community in preserving its memories and common legacy, and also on ‘re-ordering them and making sense of them for later generations’ (Watson 2007: 4). This thesis case study museums, both the *Museu do Trabalho Michel Giacometti* and the *Núcleo Museológico de Alverca*, have been developing their work based on the identification of such surrounding communities. Watson further notes that communities can be ‘defined by their specialist knowledge’; by demographic/socio-economic factors; by identities (national, regional, local or relating to sexuality, disability, age and gender); by their ‘visiting practices’; by ‘their exclusion from other communities’; and finally, by their location (Watson 2007: 4-8), which are factors that emerge in this thesis case study sites (Chapters Five and Six).

Watson believes that, although we can belong to different geographies throughout our lifespan, and thus develop different spatial identities, ‘there are many people who associate themselves with the place in which they currently live. [...] Their identities are embedded in a sense of place.’ (Watson, 2007: 8) This sense of community as emplacement has been a key factor in the implementation and articulation of Portuguese Local Museums during the last four decades, as one of the Ecomuseology and Social Museology’s premises has been the theoretical replacement of the notion of the museum as an institution

bounded by its building and collection, with the idea of the museum as emplacement, connected to its wider territory and present in the Malraux's idea of *musée sans murs*.

However, regardless of the definition of community that may be prevalent in a museum's articulation of the group of people they serve, one can recognise, as Crooke suggests, an intricate relationship between museums and their communities, which can, for instance, be expressed in the notion of the (re)construction of heritage. Crooke asks: 'Does heritage construct the community or does a community construct heritage?' (Crooke 2007: 1). Are museums simply showcasing a community's 'identifiable history, culture and landscape', or do they have an active role in the (re)definition of their communities' identities? (Crooke 2007: 1). According to Crooke, this duality implies that:

communities need the histories and identities preserved and interpreted in museums; and the museum sector needs the people, in the many communities, to recognise the value of museums and justify their presence. [...] the links between the two are far more intricate and dependence too great to be able to say which needs the other more. Rather, community and its history, heritage and the museums we visit, are dependent on one another and [...] this dependence takes many forms. (Crooke 2007: 1-2)

On the other hand, Watson calls our attention to the *power tensions* between museums and their communities and 'how museums often struggle to understand the relationships they have with their communities and how difficult they find it to share the power they have' (Watson 2007: 9). Tensions arise not only over interpretation and representation, but also, over issues of community's participation in the collecting and exhibiting processes no longer relegating them to a mere consumer's role. Or, concurrently, museums can struggle with their communities' expectations, which may tend to view the exhibitions as celebratory opportunities of their past and identity, avoiding 'negative

and contentious ideas'; finally, museums may have to sensitively navigate among 'competing versions of histories among communities and across generations' (Watson 2007: 11).

Ultimately, when reflecting upon the particularities of the Portuguese local municipal museums, Marta Anico alerts us to the possible artificiality and incompleteness of those museological narratives, which claim to display the cultural identity of a given community. Anico states:

The ideas and values displayed in municipal and other local museums frequently act as a protective strategy, promoting an essentialist and primordial identity paradigm based on the existence of a mythical local community and a vision of a past and authenticity, solidarity, place and local distinctiveness. [...] Focusing on an imagined past, which vaguely resonates with the experience of only a few, may transform local and municipal museums into *identity bunkers*. (Anico 2009: 64 [author's emphasis])

Hence, although the fostering of a common heritage, and its mediatisation through museums, can serve contemporary societies in these times of rapid changes and instability, by 'asserting continuity and stability' (Anico 2009: 63), one should remain aware of the multiple tension zones between museums and their communities that we briefly aimed to identify in this section.

A possible way to navigate through those tension zones is suggested in Viv Golding and Wayne Modest's *Museums and Communities: Curators, Collections and Collaboration*. Golding, while recognising the strain between the museum's concern with curatorial integrity (maintaining power) and its, simultaneous, aspiration for community engagement (having a social impact), nevertheless, she asks if 'such an oppositional perspective is unavoidable? She wonders if museums might be led by a

strong ethos of collaboration while at the same time maintaining strong curatorial integrity? Can museums be *both* about something *and* for someone?’ (Weil 1999 quoted by Golding 2013: 25 [original emphasis])

### 3.2.2. Local Museums and Their Communities

It has been proposed that the reformist, or even revolutionary, intentions of the Ecomuseums movement were translated into the end of the century new museums philosophy (Hudson 1992; Dutta: 2010: 5). The novel museological paradigm encapsulated in Hooper-Greenhill’s formulation of the ‘post-museum’ (2000: x) can be construed as a reinterpretation and reconfiguration of the imperative need to reform the museological institution by employing different ways of improving its social relevance. On the other hand, the post-museum can also be contextualised in terms of the specific economic conditions that emerged in the last two decades of the Twentieth Century, when increasingly scarce resources imposed a culture of accountability regarding public funding. Museums could not continue to pursue self-serving agendas, regardless of their degree of expertise in the field, without conveying its message in an accessible, inclusive and attractive fashion to as many visitors as possible. Visitor statistics became the new creed, as the paramount indicator of social relevance.

And what about local museums? With the general refocusing of the museum’s attention towards its communities, was there still a specific role for these particular museological institutions? And how should they measure their social impact, when their visitors’ turnout is a pale shadow of their national counterparts?

The Brazilian museologist, Judite Primo, who has been working in Portugal for the past decade, argues that local museums have specific responsibilities towards their communities. Primo contends:

The Local Museum, as a development advocate, cannot disregard the context of the problems of its local area of influence, neither without the people that constitute its local community. In other words, the museum cannot disfranchise itself from the problems of the present without facing the consequences of isolating its action. (Primo 2006: 48 [our translation])

Primo, along with Moutinho, before her (1993), proposed that local museums should be responsible for setting forth a museological agenda, which prioritises local development, not only through the identification and valorisation of the community's tangible and intangible assets – such as, its particular cultural and patrimonial heritage; but also by being available to support local educational programs, or to be part of the implementation of policies that foster employment and life-long training (Primo, 2006: 44).

This view resonates with Elaine Gurian's vision of community museums as 'soup kitchens' – not necessarily in a literal sense, although she does not exclude the importance of providing affordable meals in periods of severe economic distress –; as flexible resources at the service of their communities through a menu of services: sharing knowledge and expertise with individuals (e.g. artists) and local institutions; allowing the use of the museum physical venue as sites for community rituals, or allowing the use of the museum space to other social organizations; providing access to materials and infrastructures that are costly and of difficult access; offering low cost educational services, are among the range of possibilities these local museums can provide (Gurian 2010). This paradigmatic approach to museums' social agency finds an eloquent phrasing in Mark O'Neill's words: 'Museums can only be as good as their analysis of society and their awareness of the reality of people's lives' (2006: 111).

As noted in the beginning of this Chapter, the Portuguese Local Museology, which emerged concurrently to the country's democratisation, has been deeply embedded in the principles of Ecomuseology<sup>56</sup> (Hudson 1992: 30), New Museology<sup>57</sup> and Social Museology (Moutinho 1993). These are somewhat similar and interconnected conceptual approaches to the museological practice, although, Kenneth Hudson refers to the New Museology as a bi-product of the original Ecomuseology (1992: 27-31), while Hugues De Varine stresses the differences between the two (Varine 1996: 21-26) are underpinned by the pivotal idea of museums' *social agency*. In other words, the museum's capacity to influence and have a constructive effect on society; capacity which has been asserted by several voices in the field (Silverman 2010, Gurian 2010, Sandell 2002, Anderson 1994, Mensch 1992). Whereas, according to the Portuguese museologist, Mário Moutinho, the concept of Social Museology conveys the effort of the museological institutions to adapt to contemporary societies:

The distant, aristocratic, Olympic institution, obsessed with the appropriation of objects with taxonomic purposes, has been increasingly – and this has been a cause for concern for some scholars – giving place to

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<sup>56</sup> According to Georges Henri Rivière, 'an ecomuseum is an instrument conceived, fashioned and operated jointly by a public (eg. local) authority, and its local population. The public authority's involvement is through the experts (staff), facilities and resources it provides; the local population's involvement depends on its aspirations, knowledge and individual approach. It is a mirror for the local population to view itself, to discover its own image, and in which it seeks an explanation of the territory to which it is attached and of the populations that have preceded it...[...]'(Rivière 1985 quoted by Hudson in *Museums Journal*: April 1992: 29).

Concurrently, Hugues de Varine, his museological partner and inventor of the term ecomuseum, observes that the ecomuseum's 'objective is the service of humankind and not the reverse; time and space do not imprison themselves behind doors and walls and art is not the sole cultural expression of humanity. The museum professional is a social being, an actor of change, a servant of the community. The visitor is not a docile consumer, regarded as an idiot, but a creator who can and should participate in the building of the future – the museum's research.' (Varine 1986 quoted by Hudson in *Museums Journal*: April 1992: 29)

<sup>57</sup> Museologist Peter van Mensch states that the term 'New Museology' has been introduced in museological literature at least three different times at three different places': firstly, by Benoist (1971:2) when referring to early 20th century changes in art museums (decluttering the art gallery); secondly, in 1958, by Mills and Grove in the book *The modern Museum and the Community*; and finally, in the 1980s by André Desvallées in an article for the *Encyclopaedia Universalis* (Mensch 1992, n.p.). The term was later introduced in Great Britain in 1989 by the influential book of Peter Vergo *New Museology*, which while written almost 3 decades ago remains relevant.

an institution open to its surroundings, conscientious of its organic relation with its own social context. The museological revolution of our time – which manifests itself through new community museums, museums ‘sans murs’, ecomuseums, itinerant museums, or museums that explore the apparently infinite possibilities of modern communication – has its roots in this new, organic and philosophical consciousness. (Moutinho 1993: 5 [our translation])

Concurrently, Peter van Mensch proposes that New Museology can also be translated by the concept of community museology, or even, popular museology. Hence, as Mensch notes its goal is the ‘development of a given community by re-enforcing a sense of (cultural) identity’ by using the community’s common heritage to improve its self-image through a process of active engagement and reclaiming of the community’s responsibilities in presentation and preservation of the material or immaterial evidences of their heritage’ (Mensch 1992: [4]).

Significantly, whilst the roots for this new understanding of the museological institution are to be found in the French Ecomuseums movement and the theorisation of the ‘Muséologie Nouvelle’<sup>58</sup>, and on its subsequent appropriation in Latin America, Canada and Portugal (Hudson 1992, Mayrand 1986, Davis 2010), the interpretation of museums as social entities, with larger social responsibilities, has become a recurrent theme in the contemporary museological debate. This stance has been influential, even impacting the rephrasing of ICOM’s definition of museums:

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<sup>58</sup> In France the concept has materialised in the institution of two organizations the MNES, Muséologie Nouvelle et Experimentation Sociale (1985), and the 1985’ Movement Internationale pour la Muséologie Nouvelle (MINON) (Mensch 1992: [3]) In its statutory principles, the MINON acknowledges the common threads within ‘new museology’ inspired initiatives: such as, the role of museums ‘to provide a population with access to a better self-knowledge and understanding of the conditions of their existence; this museological activity is characterised by an interdisciplinary approach in which the human being is considered in the natural, social and cultural environment. Within this perspective the concepts of ‘milieu’ and ‘context’ are essential; [...] methods and practices are to be used to actively involve the population’ (in Mensch 1992: [4])



A museum is a non-profit, permanent institution *in the service of society and its development*, open to the public, which acquires, conserves, researches, communicates and exhibits the *tangible and intangible heritage of humanity* and its environment for the *purposes of education, study and enjoyment*. (ICOM 2007 Museum Definition. [author's italic emphasis])<sup>59</sup>

Hence, when the influential American museologist Stephen E. Weil asked 'can and do museums make a difference?' he was echoing a general concern throughout the museological field (Weil 2002: 55). Can an institution born from Eurocentric, elitist and positivist worldviews still positively and sustainably impact our contemporary post-colonial, socially diverse, postmodern world (Zizek 2010)? A world dominated by consumerism, led by an autophagic capitalistic system, and increasingly threatened by environmental disasters (Janes 2009, Zizek 2010); a world reacting to a diffuse, but almost palpable, sense of insecurity aggravated, for instance, by the disarticulation of long standing social pacts, namely the degradation of the welfare state in western countries.

Or, at a micro level, how can a museum make a difference in a community menaced by unemployment, and by the lack of opportunities for its younger generations? In what ways can a museum 'make a positive difference in the quality of people's lives'? (Weil 2002: 74) The Portuguese Local Museums movement and its theorists have been, for almost four decades, focusing on the museums social role; thinking of ways, not only, to engage with their communities, but also, developing tools in order to access their social impact (Victor 2005).

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<sup>59</sup> ICOM Statutes, adopted during the 21st General Conference in Vienna, Austria, in 2007. The inclusion of the idea of museum as an institution 'in the service of society' dates to the 1974' definition, and it has been explored in the subsequent rephrasing (1989, 1995, and 2001).

### 3.2.3 Portuguese Local Museums and their Communities – The voices in the field

As an additional part of our research we have invited key museum practitioners and museologists working, or having worked, in this thesis' case study museums<sup>60</sup> to participate in our examination of the engagement these museums are fostering with members of their communities. We have conducted four extended open-ended individual interviews, through which we have gained additional layers of context. Over the next section we will address some of the main issues discussed.

#### **The specificities of Portuguese Local Museums – The voices in the field**

Isabel Victor is a renowned Portuguese museologist, from Setúbal who has been working and researching in the field for more than 30 years. She was the director of the Museu do Trabalho Michel Giacometti (MTMG) for more than ten years, and then accepted the professional challenge to coordinate the Portuguese Museums Network (RPM). Her research is mainly focused on Quality Issues in museums (2005), but she has also made important contributions to the subjects of museums' cultural accessibility, local museums, inter-culturalism and Socio-museology. She has been a member of the International Movement for the New Museology (MINON).

Regarding the role of local museums in the Portuguese museological system, Victor believes that the paramount change for the Portuguese

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<sup>60</sup> We have interviewed the director of the Núcleo Museológico de Alverca, and an Educational and recreational mediator working directly in the field. As for the Museu do Trabalho Michel Giacometti, we interviewed its former director (she had been working at that level for more than one decade), and at the time she had recently been appointed Director of the Rede Portuguesa de Museus (Portuguese Museum Network). We also interviewed one member of staff working in the development of one of the museum's most significant adult oriented projects – namely the Tardes Interculturais (Intercultural Afternoons).

museological system and for its local expressions was catalysed by the country's democratic revolution:

The post-25 of April brought something extraordinarily important – apart from the political and social revolutions. It brought the precise consciousness of the value of democracy and of its local communities' expression. Portugal was a country of which it was usually said that the country was Lisbon and the rest was landscape. People used to say that and, in fact, it was true. There was an elite that would go to the university, but the country was profoundly stratified and, so, the consciousness of the [local] expressions and cultures was completely insignificant. The 'conscientisation' of the value of that [local] expression, of those communities was extremely important. At that moment, the people became aware of how important those cultural manifestations were and of the need to improve the cultural facilities network, at the time extremely fragile. [MTMG IV [our translation] [author's emphasis]]

The country's investment in those cultural facilities started by the creation of national public libraries network, the first network of cultural facilities in Portugal, and continued with the valorisation of the museological infrastructures (remodelling previous structures, constructing new museological spaces), particularly of their local expressions. As Victor notes:

Portugal is a country with a strong municipal tradition. [...] And so, [the creation of a local museums network] was the materialisation of that historical heritage. [...] And to that extent, the role local government played was crucial. [...]

Local governments, the municipalities, soon realised – and I was connected to several municipal councils from early on – that culture is a strength. It is a strength for political statement. It is a strength for cultural assertiveness as it almost encapsulates everything the city/town has to offer: of its values, of its heritage, of its history. At that time [late seventies and early eighties] the expression was not in use,

but it really was an '*identity boost*'. We were heading in that direction, weren't we? And it started growing, that consciousness started growing. [MTMG IV [our translation] [author's emphasis]]

Victor emphasizes statements of the previous section of this Chapter: local museums have been the most dynamic expression of the Portuguese contemporary museological system, with numerous new museums being inaugurated by the local authorities throughout the country, particularly from 1990 to 2009. She further observes that these local museums revealed specific characteristics:

Municipal museums started having an *increasing relevance in their local spheres*. Not only as a statement of the historical patrimony, preserving their evidences [...], but also by *connecting with the universities* and by *getting inspiration from international experiences*. There have been several juxtapositions.

In truth, local museums were allowed more freedom. *Working in straight connection with the communities and the territory* and that provided an extraordinary rich and creative laboratory. In that sense, I believe they have benefited from a larger degree of liberty to be innovative, to create something different. *They were less bound to the canon*. These museums knew they had to follow certain rules in order to fulfil their museological missions, but they were freer to work differently. On the other hand, being closer to the decision makers [...] made their *processes less bureaucratic*. [MTMG IV [our translation] [author's emphasis]]

However, another of our interviewees, Anabela Ferreira, is less convinced of the generalisation of some of these features. Ferreira has been the director of the Núcleo Museológico de Alverca (NMA) since 2007. She started working in the museum under the direction of Clara Camacho<sup>61</sup> and has been developing some of Camacho's ideas (and

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<sup>61</sup> Another important figure in the Portuguese museology scene, who is quoted several times in thesis.

adding her own) regarding community engagement and the diversification of the museum's publics. She believes the work the NMA has been doing is not common to all local museology:

There is a difference between what in theory a local museum should be and what a local museum actually is. And there are quite different realities, from one museum to the next. Even in this museum, which is a satellite from a bigger one [Museu de Vila Franca de Xira] there is a different path. It is the path I believe in, I don't know if it is the right one, but it is the one I think it is the appropriate one for this reality. *The ideas of community proximity and community engagement are not being actualised in every case* [local museum]. Many times, they fail tremendously [...] for instance, when planning a new exhibition, many don't involve the population, don't consult them.

Here, maybe because of *how we started*, with a campaign calling for the population's donation of their old and out of use objects, *we built our ethnographic collection directly with our community*. And this initial close contact with the people became a *pattern*. [...] In other local museums we still see too many exhibitions that are the brainchild of a sole individual, usually the curator. [...] And which are meant to be appreciated by an elite. [NMA AF [our translation] [author's emphasis]]

Concurrently, Ferreira reckons local museums still need to tackle the general population's bias towards museums: the belief that they are elitist institutions, intended for the cultivated visitors:

*Entering a museum is still a very unusual thing*. People, a lot of people, still knock on our door asking *if they have to pay*, or what kind of 'stories' the museum has. When they do enter, they are pleased, but before passing our threshold there is still work to be done. The idea of the museum as something elitist prevails. [...]

Our victory happens when, after that first visit, people mention that they had a different idea of what a museum is supposed to be. They believed the *museum was only meant for people with degrees*. [...] And when they visit and *see themselves reflected in the exhibitions*, in the

objects, in the interpretation labels, in the words we post on the walls  
*in the people that are here for them*, then those people come back again.  
[NMA AF [our translation] [author's emphasis]]

Regarding the importance of developing sustained relationships with the museum's community(ies), Ferreira is very assertive:

[In local museums] that importance is total [...] if we want to put up an exhibition and if we want that exhibition to be visited, and I am not talking about school visits, *we have to engage our community*. Otherwise, people won't come! *If they cannot identify with it, if they don't feel they are in some way represented or reflected in the exhibition they will not even bother to come*. Every time we have a new exhibition we involve different people; we have been slowly but steadily gathering people, and they will bring their families, they will bring their friends. [...] And those people really help us [collecting new objects, gathering information] *I really depend on them!* [NMA AF [our translation] [author's emphasis]]

Similar connection with the museum's communities has been experienced by our third interviewee, Maria Miguel Cardoso. Cardoso started working at the MTMG, in Setúbal, during her degree internship. She is a trained anthropologist who had been developing her professional activity at the museum for more than nine years, at the time of our interview<sup>62</sup>. She had been involved in some of the museum's most paradigmatic work, namely, constructing an Oral History video archive, with elder community members and, also working on the project 'Intercultural Afternoons', which since 2003 aimed to build bridges between the town's diverse communities; from the traditional population, to the more recent 'setubalenses', people coming from Brazil, from several lusophone countries in Africa, from the Ukraine, etc. that have chosen to settle in Setúbal, adding new identities to the town's cultural ground.

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<sup>62</sup> On the 29th of April 2013

Regarding the specificities of the work developed by local museums, Cardoso contends:

Not only in our museum, but also when we participate in conferences with colleagues from other local museums [I get the same impression], I think there was a *watershed*. I believe that over *the last decade the tendency for local museums to work directly with their communities* has become evident. They are *working* more and more *with and for their communities*. And most of all, they are *implicating those people in their museological processes*, in their research and in their exhibitions. There is an engagement that I am not sure if it could occur in more traditional museological settings. [MTMG MMC [our translation] [author's emphasis]]

However, like Ferreira, Cardoso also finds that many museological projects in Portugal, especially those pertaining to national museums or to more traditionalist museums, are still being regarded as elitist and avoided by individuals of less educated cultural backgrounds:

The [museological] discourse [in those exhibitions] is very academic and self-referential. *They are not giving voice*. They are not calling the common people to say what they think, or feel about those objects, sometimes objects that some of them, or their ancestors, used. [...] *It's a discourse from the top to the top*. Because, in the end, other *people don't feel invited* to visit because they simply can't understand what is written. They don't have the tools to make meaning of those huge labels, filled with academic jargon. [MTMG MMC [our translation] [author's emphasis]]

Nevertheless, she prefers to stress the major power shift that has been occurring, particularly among local museums:

I think local museums have been valuing the work they can do with their communities, and have started to *value their communities'*

*knowledge*. The things that people know! And I don't think that that was being done ten years ago. [...] Although, I agree these ideas were present in the minds of many people working in the [museum's] field in the early days of democracy. Movements need time to consolidate, to become functional and to adapt to society and I believe that *we are finally materialising that ideology of power redistribution*. [MTMG MMC [our translation] [author's emphasis]]

To different degrees, our interviewees recognised and confirmed the distinctiveness of the Portuguese local museums' experiences in the general framework of the Portuguese museological system, previously expressed in the literature cited. It is our understanding that those specificities can be summarised in the following: firstly, a 'communities turn' by local museums starting to focus on their people and territories; secondly, the recognition of the unique tangible and intangible heritage through the use of community centered methodologies; and thirdly, the sharing of power in the museological processes and the implication of the communities in those processes and museological outcomes (e.g. exhibitions).

### **Challenges and Constraints Affecting Local Museums**

In addition, our interviewees identified what they believe to be the biggest challenges and constraints Portuguese local museums have to face. Those challenges are mainly twofold: on one hand, the very nature of their governance, the one that makes them less bureaucratic and closer to the decision makers, makes them eventually more vulnerable to political agendas. As Victor notes:

By working in close connection, politicians and museum staff 'grew' together. But there is another side to the coin, the *concessions and the connivances*. Meaning, in some ways, the relationship can be contaminated by some [political] trends, by some party's sway, by some *political agendas*. That is the other side of the coin. We could gain from a more technical and unbiased approach, which is not always



prevalent. Sometimes there is a certain promiscuity that has the benefit of making things move forward, but other times it stifled some processes. [MTMG IV [our translation] [author's emphasis]]

Nevertheless, Victor believed that the new Framework Law<sup>63</sup> for the Portuguese museums and the action of the RPM provided appropriate strategies for museum staff to follow in order to tackle these issues.

The other constraint is of a financial nature and was particularly felt during the period of our fieldwork (2012-2013), during Portugal's severe recession and the austere strategy followed by the central government. Ferreira noted how the cuts affected the number of available staff, the impossibility to improve the museum's IT network, and how many projects could not be materialised due to lack of funding:

Our main constrain is the *lack of human resources*, and that is something that is common to all local museums and national museums too. [...] But also the *equipment*, our computers are *obsolete* [...] and that makes our work less efficient. But the main problem is the size of our team. It is small and every time someone retires we know that there will be no replacement. And for that problem there is no solution. We just have to deal with it. And it pains me to refuse some visitors because we simply cannot accommodate them. But I have colleagues who became sick from overwork and I will not allow it to happen again. And I think I need to make a point! I think people in charge need to recognise that there is a problem. [NMA AF [our translation] [author's emphasis]]

Throughout this Chapter we have aimed to provide a multi-layered contextual setting, and outline the main issues that underpinned the specificities of our research scenario. We have chosen an approach from the general to the particular: from the historical and institutional

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<sup>63</sup> Lei n° 47/2004 19th August

backgrounds, which contributed to the contemporary situation of the Portuguese museology, to the micro-level impressions of our case-studies staff, with their unique voices and readings of what they believe to constitute the contributions and challenges of those museums. Over the next Chapter, we will present this thesis methodological approach and the theoretical framework that underpins it. We will look at the research design and present the different methods used to gather and interpret this research data.

## **Chapter Four: Methods and Matter – Methodological Approach and its Theoretical Underpinning**

### **4.0. Preamble**

This Chapter presents the methodology selected for the research study, exposing the rationale that grounded methodological choices and the research design. The specific aim of the thesis, namely, to explore and study the nature of adults' sustained museum experiences and engagement at two Portuguese local museums, an enquiry imminently exploratory, called, in our opinion, for a Qualitative research approach.

Qualitative research has been steadily asserting its influence and relevance within academia for the last five decades. From the 1950s onwards, with the appearance of the first articulated post-positivist arguments (Hughes n.d.: 3), to its complete establishment in the 1990s in all its subtle variations: such as naturalistic inquiry (Lincoln & Guba 1985), grounded theory (Glaser & Strauss 1967), narrative inquiry (Clandinin & Connelly 2000), interpretive research (Geertz 1973), etc.

According to Silverman (2014), a simplistic definition of Qualitative research can be produced as an opposition of Quantitative research: where quantitative research generates data that allow numerical analysis, qualitative research describes phenomena in context; where quantitative research uses statistical calculations, qualitative research interprets processes or meanings; where quantitative research uses statistical software and pre-tested scales, qualitative research uses theoretically based concepts; and finally, where quantitative research seeks explanations and correlations, qualitative seeks 'understanding' (Silverman 2014: 5) However, the reality of both quantitative analysis and qualitative analysis is more complex. As Silverman argues, it does

not suffice to say that the first deals with numbers and the second with words, as both can use numbers and words; it is not correct to say that hypothesis are exclusive to quantitative studies, as some qualitative research projects are hypothesis driven, and value adjectives such as hard/soft; fixed/flexible; objective/subjective, among others, can be underpinning a biased evaluation of research methods. Finally, and central to Silverman's argument each research paradigm should fit the particular research inquiry (2014: 9).

Concurrently, Qualitative research has also found the space to assert itself within the Museum Studies field. As George Hein observes, contributions from Oral History, Anthropology and Ethnography, Psychology and Educational Sciences have made their way into the Museum Studies research field, establishing naturalistic and qualitative inquiry as valuable theoretical perspectives, and offering suitable methodological approaches, that served as alternative to the behaviouristic paradigm particularly prevalent within visitor studies (Hein 1998).

Our study of adults' perceptions and reflections upon their sustained museum engagement involves a research ground filled with epistemological challenges that we believe are better served by a qualitative approach. From the debatable representativeness of the selected sample; the non-hypothesis based research design, the 'truthfulness' of the individuals' recollections regarding their museum experiences, to our inference of meaning and construction of knowledge based on those individual narratives, these are all attributes that would traditionally discourage quantitative analysis.

However, our analysis does not aim to produce a generalisation of what a sustained museum engagement should be, or look like, or to present the conditions under which that engagement is likely to occur. Our goal is perhaps less grand: to explore and possibly begin to understand,

grounded on a particular case-study research scenario, the possible meanings behind our participant's accounts of their museum experiences and museum engagement. And for that, this novice researcher finds solace in Jenifer Mason's qualitative argument: knowledge production is always tentative and researchers should embrace this 'complex – possibly multi-layered and textured – social world' (Mason, 2002: 3).

#### **4.1. Words of Influence – Epistemological and Theoretical Perspectives Underpinning this Thesis.**

##### **4.1.1. Constructivism and Critical Pedagogy - The shaping of this thesis theoretical perspective**

Michael Crotty's (1998), classical work *The Foundations of Social Research*, considers that every research project is based on four intertwined elements: epistemology, theoretical perspective, methodology and methods. He argues that the methods adopted in research derive from methodology, which is deeply grounded on the theoretical perspective (philosophical stance). He finally emphasises how the theoretical perspective is informed by a greater set of beliefs about knowledge itself, i.e., our epistemology.

Crotty recognised three main epistemologies currently basing the production of scientific knowledge: Objectivism, constructivism and subjectivism. In addition, he alerted us to avoid misinterpreting epistemologies as theoretical perspectives, because, although they are connected, they are not quite the same thing, as one informs the other.

Following Crotty, this thesis assumes that 'truth, or meaning, comes into existence in and out of engagement with the realities in our world' (Crotty 1998: 8), the world of the museum and beyond for this thesis, thus positioning itself in the epistemological space of constructivism. It is our understanding that there is 'no meaning without [the] mind' that constructs it. And, conversely, we do not concede to objectivism and its 'epistemological view that things exist as meaningful entities independently of consciousness and experience, that they have truth and meaning residing in them as objects', nor, in an opposite stream, do we believe that meaning does not come from 'the interplay between subject and object but is imposed on the object by the subject', as subjectivists do (Crotty 1998: 8-9 [original emphasis]).

As we have previously explored in this thesis Literature Review Chapter, Constructivism as well as rejecting passive transmission-absorption models of knowledge construction, alerts us for the need to recognize the individually dependent nature of knowledge itself. As Hein states:

The validity of ideas according to constructivists does not depend on their match to some objective truth, which has an existence separate from any learner or group of learners. Rather, validity arises from the value of the concepts in leading to action (use) and in the consistency of the ideas one with another. (Hein 1998: 34)

So, when thinking of the social world, and of the social phenomena that it entangles, this thesis reflections are certainly grounded on the constructivist epistemological paradigm. However, in terms of the theoretical perspective, the extent to which this research into social and cultural realms might play an important role as an agency for human rights was explored. This thesis contends that subjects such as social inclusion, equity, public value are best served if researchers engage in a more critical analysis and praxis that Paulo Freire (1968; 1970: 2005) outlines in *The Pedagogy of the Oppressed*.

Freire has played a critical role in the shaping of this thesis's theoretical perspective. His Critical Pedagogy proposes a fundamental sociological need for emancipation, for liberation through knowledge. Freire conceived learning as a unique way for underprivileged men and women to escape their history of misery and subjugation. Thus, in Freire's formulation, learning is perceived as an ontological pathway for individuals, in order to transcend their historical constraints, and gain self-awareness through as he terms it a process of 'conscientization' (1968; 1970: 2005). While he was working with Brazilian subsistence farmers in the 1960s, his thesis is relevant to ours since we are examining a group of citizens who, for the most part, were

disadvantaged by the socio-economic system in which they were educated as children, during the Portuguese dictatorial regime known as Estado Novo, as we will demonstrate in Chapter Five.

Drawing on Freire to look at the racism in the USA, the distinction Lindauer (2007: 306-307) establishes between critical pedagogy with its emphasis on social change and the more limited perspective of constructivism is vital to observe here. For constructivists, learning generates new skills and competences, which enable new experiences, making the individual more prepared to act in different scenarios. For critical pedagogues, learning must be transformative if it is to tackle the question of inequality. This thesis considers critical pedagogy as a more ambitious theoretical framework; devising a core political dimension that constructivism fails to embrace (Lindauer 2007: 307). Garcia (2010) reinforces this thesis position. He notes that qualitative research, based on a constructivist and critical theoretical perspectives, is not only about creating meaning, but also about creating difference. For instance, by improving museums' 'Public Value' (Garcia, 2010: 5) through the understanding and theorization of adult experiences in museums, informal learning experiences, or other.

We believe that one of this thesis strengths is the three-folded dialogue between our epistemological paradigm, our theoretical perspective and the methodology we have developed and used. For example, Freire's idea of 'conscientization' has found its methodological outcome through the use of open-ended interviews that called for the participant's interpretation of their life path and their engagement with museums, offering them an opportunity to think critically about the external and internal forces that have been shaping their experiences, and thus finding their voice. Concurrently, this thesis is particularly interested in recognising the participant's voice and its integrity and the need to listen to it actively and considerately.



#### 4.1.2. The contribution of Narrative Inquiry

Despite its many supporters, qualitative research, is still subject to several epistemological criticisms (Kvale 1994). One of the main arguments is built upon the issue of objectivity, as it is usually conveyed by the conventional and neo-positivist paradigms. Questions regarding the ‘truthfulness’ of interview testimonies and how to produce meaningful interpretations from them called for a critical reflexion and it was in this challenging path that additional possibilities were explored in the research. One of the most fruitful possibilities was found in Narrative Inquiry.

#### **Narrative Inquiry and the concept of objectivity**

Interestingly, when analysing the implications of public opinion polls (a statistical method, seldom used as an instrument in qualitative research), Pierre Bourdieu alerts us to the fact that every inquiry (political, or not<sup>64</sup>) has its own particular agenda, and we would argue that, to an extent, all inquiry is rooted within a political field. As Bourdieu notes:

Scientific analysis of opinion polls shows that there exists practically no catch-all problem: no question which is not reinterpreted in relation to the interests of the people to whom the question is posed. (Bourdieu 1993: 151)

Although Bourdieu is not addressing the subject of narrative inquiry<sup>65</sup>, he is reflecting upon one of its fundamental threads, i.e., the need to

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<sup>64</sup> In fact, Bourdieu believed that academic inquiry had a ‘much greater distance from social demand’ (Bourdieu 1993: 150), thus being less biased and politically freer. However, with the pressing financial constraints generally felt over university departments, and with funding panels tending for more pragmatic lines of research, one could wonder if this is still the case.

<sup>65</sup> In his essay, Bourdieu is actually addressing the artificiality of polls as sensitive readers of public opinion, on a given matter. He argues that ‘in real situations, opinions are forces and relations between opinions are power relations between groups.’ (Bourdieu 1993: 155)

procure meaning through people's reflections of their own experiences. So, in his view, in order to be able to speak of 'objectivity' inquiries should 'break all the rules of 'objectivity and give people the chance to situate themselves as they really do in real practice, that is, in relation to already formulated opinions' (Bourdieu 1993: 151).

Hence, whilst we do not mean to suggest that the in-depth, open-ended narrative interview environment is a natural and equalitarian setting, we strongly believe that it is an important steppingstone to finally free qualitative constructivist grounded research from its own 'positivistic ghosts'. Next, we will briefly address some of Narrative Inquiry's methodological landscapes (Clandinin & Rosiek 2007).

### **Mapping Narrative Inquiry**

Narrative inquiry has a history of its own inside academia. Pinnegar & Daynes (2007: 3) note the recent and tentative history of 'how the academy opened up in a way that made space for narrative inquiry'. They identified 'four themes in the turn toward Narrative Inquiry' (Pinnegar & Daynes 2007: 7):

Firstly, Narrative Inquiry is critically aware of the inevitable relationship between researcher and participant. It acknowledges the relational dimension of inquiry and the context. As Pinnegar and Daynes (2007: 11) state 'researchers admit that the humans and human interaction they study exist in a context and that the context will influence the interactions and the humans involved'. Thus, as there cannot be an 'airtight objective research methodology' when it comes to researching humans, Narrative Inquiry acknowledges the impact of the relational dimension between the researcher and the research participants.

Secondly, Narrative Inquiry marks a turn from numbers to word data and from statistics to stories. This 'is not a general rejection of numbers but a recognition that in translating experience to numeric codes

researchers lose the nuances of experience and relationship in a particular setting [...]’ (Pinnegar & Daynes 2007: 15). What this turn recognizes is that reducing words to numerical data compromises the possibilities to interpret the nuances in the research data, thus compromising a richer understanding of the human interaction.

Thirdly, they observe a shift from general to particular. This movement is deeply connected to the realisation of the fundamental dimension of the particularities of the research context. Narrative researchers move away from the positivistic grand narratives that craved for generalizability beyond the particular settings, embracing ‘the power of the particular for understanding experience and using findings from research to inform themselves in specific places at specific times’ (Pinnegar & Daynes 2007: 24).

Finally, Narrative Inquiry admits alternative epistemologies and acknowledges the tentative nature of the production of knowledge. By turning to the relational, by looking into the particular stories, by accepting the contingencies of the particular and the specific, narrative researchers are allowing ‘wondering, tentativeness, and alternative views to exist as part of the research account.’ (Pinnegar & Daynes 2007: 25)

Narrative Inquiry has proved to be a valuable approach to this research in Portugal, one that sensitively fits the epistemological perspectives and the critical pedagogical foundations of the thesis, as we will later describe.

## 4.2. Methodological Approach and Research Design

### 4.2.1. Research Purpose and objectives

This thesis aims primarily to understand the nature of adults' sustained experiences (notably cognitive, social, emotional and aesthetic) in their interaction with two particular Portuguese Local Museums, over a considerable period of time, the Museu do Trabalho Michel Giacometti

The study is explicitly focusing on adults' sustained museum experiences<sup>66</sup> that two community-based museums have been nurturing. Being interested in the social roles contemporary museums propose<sup>67</sup>, this research aims to reflect upon other forms of museum participation, especially those in which adults involve themselves in deeper collaborations and co-creations with the museum – as partners, as resources, as participants<sup>68</sup>; whose relation with the museum is, in our opinion, richer than the occasional museum visit.

In Adam Bickford's review of John Falks' book, *Identity and the Museum Visitor Experience*, there is an argument concerning the difficulties of linking a single visit to a museum to significant *identity work* (Bickford 2010). Furthermore, although particularly focusing on museum learning, George Hein encourages museum educators to 'tackle the

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<sup>66</sup> Museum sustained experiences is a key concept in the work of Michele Everett and Margaret Barrett (2009), and it stands for visitors deep and prolonged engagement with a particular museum, over a significant period of time. This concept has become also quite central to the work developed in this thesis.

<sup>67</sup> We can find an interesting discussion, in edition of Curator (2010, n°53 (3)), regarding the new social roles contemporary museums should embrace, in these particularly difficult times. We would highlight the contributions of Elaine Heumann Gurian 'Museum as a Soup Kitchen' and of Robert R. Janes 'The Mindful Museum'.

<sup>68</sup> We agree with Yuga Jung when she calls for a transformed museum pedagogy in which: 'the current pedagogy of museums can be transformed and changed into a visitor – and education – oriented pedagogy through this praxis of reflection, action, naming, and renaming based on dialogue, love, mutual trust, and horizontal partnership.' (Jung 2010)

problem of increasing the time possible for visitors to interact with our exhibits and reflect on them, revisit them (in the mind if not directly) and therefore internalize their messages to us' (Hein 1991: n.p.). Thus, in this thesis the selection of participants with a prolonged engagement with our case-study museums was underpinned by similar arguments.

Moreover, the core of this work has been to recognise and read into the participant's narratives regarding their prolonged museum experiences, and the way they integrate them within their own biographical recounts. The interview testimonies generated by this research were approached as personal narratives from which meaning derives, not only by the vast theoretical connections that they progressed, but also by internally exploring the individual narrative's integrity.

The main preliminary argument of this research was that Portuguese Local Museums were providing a distinct ground that fostered the thriving of deep engagement and participation of their older adult audiences, giving a substantial contribution to Museums' Public Value (Garcia 2010). It was this thesis assumption that by looking at these sustained museum experiences, through the deep and thick analysis and description of narrative interview data, we could be able to make a clear contribution to this argument.

### **Research Objectives**

Firstly, to explore the nature of adult sustained museum experiences (cognitive, social, aesthetical, etc.) and engagement in two Portuguese Local Museums, selected as case studies.

Secondly, to find out how and why those experiences are relevant to their lives as individuals, but also as community members.

Thirdly, to understand in what ways their museum narratives are acknowledge in their own biographical narratives.

Initial research objectives also included the intention to:

To explore the ways museum practitioners at these sites, and at a broader scope, deal with adult learning, community participation and visitors sustained engagement. And additionally, to explore the possibilities of a praxis oriented platform that could help community-based museums to foster collaborations with their adult audiences.

These two last objectives were not pursued in the final design of this research project, as the need for focus and in-depth analysis advised against possible dispersion. Nevertheless, these two objectives could be relevant as a subsequent study in the form of the following research questions:

Firstly, in what ways are the selected local museums and museums practitioners in Portugal working with their adult audiences, in terms of their needs (cognitive, social, aesthetical, etc.), their participation expectations and the sustained engagement relationships they are fostering with their adult visitors?

Secondly, what sort of principles and practices can be useful in order to help community-based museums to foster collaborations with their adult audiences?

#### 4.2.2. Research Questions

The research objectives noted above have translated into the following form:

Firstly, what is the nature of the experiences and engagement adults are gain as a result of their sustained relationship with a particular community-based museum?

Secondly, how and why those museum experiences are relevant to their lives, and, in a broader scope, to their community?

Thirdly, how are those museum experiences narrated within their larger biographical accounts?

#### 4.2.3. Case Study Design

Following the previous reasoning, we can recognise particular features that are better served by a case study approach: it is focused on the processes (for instance, of museum learning and other museum-based experiences) and in the relationship between adult individuals and museums; it aims to be an in-depth study – given that it craves for understanding rather than mere enunciation of programs and activities; and finally, it takes place in a natural setting, rather than in an artificial laboratory setting.

The initial research questions emerged from the wide topic regarding the nature of adult experiences in museums (learning wise, leisured oriented, socially driven, etc.), and focused on the special connections between a specific group of visitors and two Portuguese local museums. In view of this, this study has not only a descriptive approach – as it attempts to present an in-depth, thick description of a noteworthy phenomenon<sup>69</sup>; but, simultaneously, aims to be an explanatory endeavour<sup>70</sup> as it aims to clarify the relationship between visitors with a sustained engagement with a specific local museum.

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<sup>69</sup> This concept entered the qualitative researcher's lexicon, after the influential work of Clifford Geertz *The Interpretation of Cultures*. Here he considers that thicker descriptions of the cultural phenomena should generate theory creation, by staying 'rather close to the ground' (Geertz 1973: 24)

<sup>70</sup> According to Ranjit Kumar, in theory, a research study can be classified as descriptive, correlational, explanatory and exploratory. Nevertheless, 'in practice most of the studies are a combination of the first three categories, they contain elements of descriptive, correlational and explanatory research.' (Kumar 2005: 10).

While Case Study research has been criticised as ‘too soft’ and incapable of producing generalizable knowledge, according to Robert Yin, the general criticism regarding Case Study research and their supposed lack of rigor can be overcome with a strong design logicity<sup>71</sup>: we should ‘use case study method because [we] deliberately want[ed] to cover contextual conditions’ – there should be a logic linking the data to be collected to the research questions –, and, concurrently, our goal should ‘be to expand and generalize theories and not to enumerate frequencies’. Also, a good case study benefits from previous solid theoretical propositions to guide data collection and analysis (Yin 2003: 10-14).

Selecting a multiple-case study research design observes Yin’s recommendation that more than one case builds up to the credibility of the study (Yin, 2003: 48). However, in this thesis the design logic was one of replication, rather than a statistical sampling rationale<sup>72</sup>, bearing in mind concerns over establishing strict causal links in social phenomena (Kumar 2005), as well as of the limits of its generalisation<sup>73</sup>. Furthermore, the research is cognisant of Robert Stake’s suggestion that qualitative inquiry should look more for the contextual integrity and less for the cause effect justification. (Stake 2008: 128).

Robert Stake considers that, even in the collective case studies, the ‘sample size usually is much too small to warrant random selection’ (Stake 2008: 129). So, he proposes a different mode of selecting the cases to study, by which the:

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<sup>71</sup> Ranjit Kumar also stresses the importance of an appropriate research design: ‘The strength of what you find largely rests on how it was found’ (Kumar 2005: 20).

<sup>73</sup> In the words of Robert Stake: Case study is a part of scientific methodology, but its purpose is not limited to the advance of science. [...] Case studies are of value in refining theory, suggesting complexities for further investigation as well as helping to establish the limits of generalizability (Stake 2008: 141).



[...] researcher examines various interests in the phenomenon, selecting a case of some typicality but leaning towards those cases that seem to offer opportunity to learn. [...] Even for collective case studies, selection by sampling of attributes should not be the highest priority. Balance and variety are important; opportunity to learn is often more important (Stake 2008: 129-130).

In order to portray the multi-layered backgrounds of the selected cases, this thesis focused on the nature of the case, on its historical background, on its physical setting, on its social, political and other relevant contexts. The relationship between the various contexts intertwines a net of complexity that qualitative case study should embrace and pursue (Stake 2008: 127).

So, a combination of a multiple-case study design with the epistemological paradigms of narrative inquiry has played a fundamental part in this thesis methodological design, increasing, its strength and integrity. However, as we will see in the findings Chapter of this thesis, although we recognise the particularities of each case, we opted for a transversal thematic analysis.

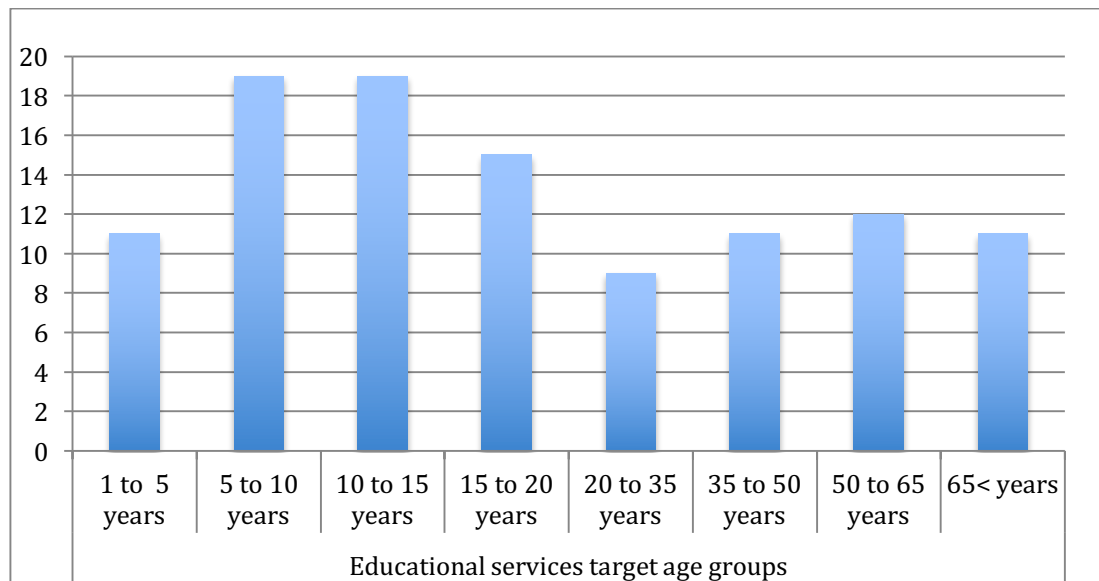
#### 4.2.4. The Selection of the Case Studies

##### **Questionnaire to the Portuguese Local Museums**

As a preliminary research instrument, an e-mail questionnaire was sent to all 46 Local Museums, at the time (2011) accredited by the *Rede Portuguesa de Museus*. The questionnaire's response rate was 43,6% (the total number of completed questionnaires was 20).

The main objective of this questionnaire was to produce a brief assessment of the adult educational provision these museums were offering their communities. Thus, we were able to identify the target

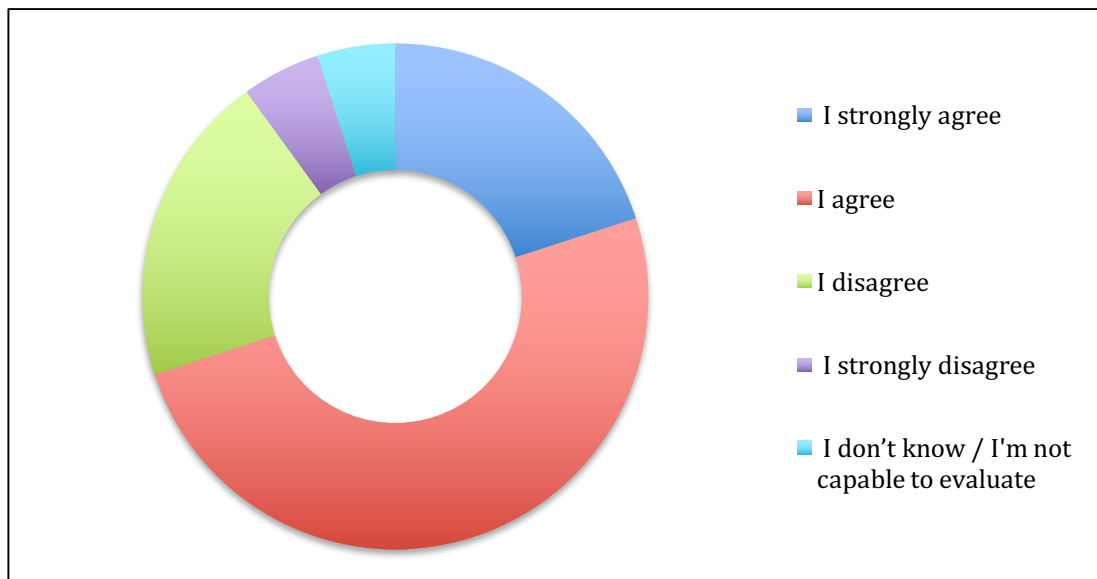
groups of their educational services, and, more importantly, as an overall conclusion, we were able to identify a positive trend regarding the adult audiences' demand for specific educational programs in these museums, especially in the older adults group.



**Figure 8 - Educational Services target groups chart.**

**Question:**

Do you agree with the following sentence: 'There has been a growing demand for adult educational programs and activities in my museum.'



**Figure 9 - Perception of demand over specific adult educational programs chart.**

This preliminary survey also helped the selection of the case studies, as both museums positively responded to it, and both firmly believed there was a growing demand for adult educational programs in their museums. Finally, they have both conducted projects with their adult visitors.<sup>74</sup>

### **Selected Case Study Museums**

1) **Museu do Trabalho Michel Giacometti (MTMG)** is an important Portuguese local museum, situated in a post-industrial town 30 km south of Lisbon, the town of Setúbal.

<sup>74</sup> e.g. Camacho et al. (2005) 'Projecto-Piloto em Vialonga. O Museu Municipal de VilaFranca de Xira e o Trabalho com Adultos'.



© Google Maps

**Figure 10 - Lisbon and Setúbal's map.**

The museum occupies a former canning factory, and one of its permanent exhibitions portrays the work processes of the factory in a recognised industrial archaeology mode. It was established in 1987 and it definitively opened its doors in 1995. It set out to exhibit, and reflect upon, the universe of Labour; being it in its rural form, with an important collection gathered by the Corse musicologist Michel Giacometti in the seventies, being it as the mentioned industrial past, or through a well thought conferences programme that looks at the contemporary labour world. Its annual visitor turnout is just over 15.000.



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**Figure 11 - MTMG's façade.**

Museum do Trabalho Michel Giacometti was the pilot case study, and it was selected taking into account, not only, the need to maximize what can be learned, since it is an 'easy and willing subject' (Yin 2003: 13), but also for its recognition as one paradigmatic example of consistent 'museum work' with its communities.<sup>75</sup>

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<sup>75</sup> Clara Camacho and Hugues de Varine, unpublished papers presented in Lisbon, March 29<sup>th</sup> 2010, during the VIII ICOM-Portugal Annual Journeys, under the theme *Museums and Social Harmony*.



© Melo

**Figure 12 - Guided visit with the temporary exhibition's curator ('Hans Christian Andersen – Um bom Amigo' / 'Hans Christian Andersen – A Good Friend'). [Above]**



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**Figure 13 – Permanent Exhibition: Rural past (first floor); Canning factory (ground floor).**

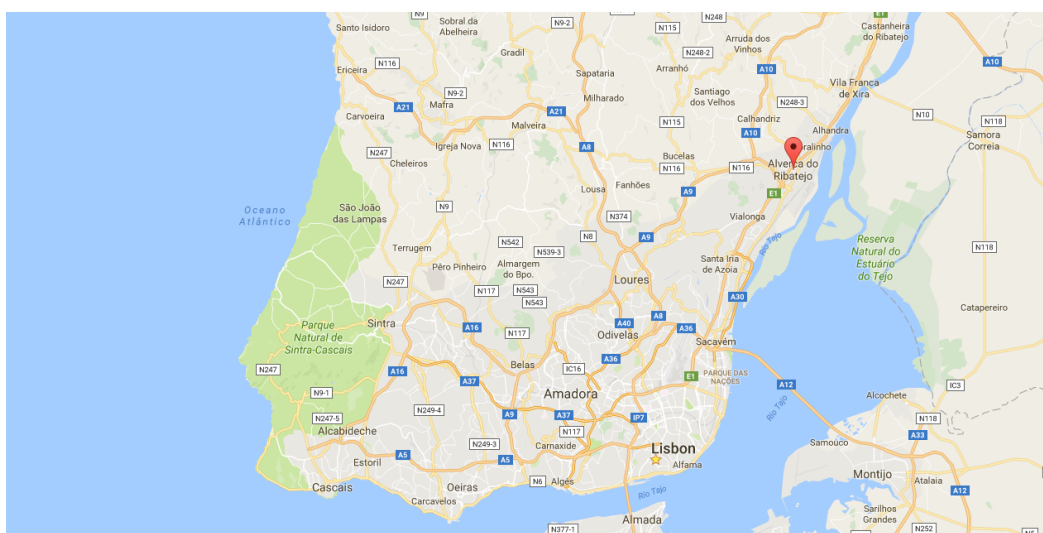




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**Figure 14 – ‘Mercearia’ room/ Grocery room (Permanent Exhibition)**

2) The **Núcleo Museológico de Alverca (NMA)** is a small museological pole of a bigger museum, the Museu Municipal de Vila Franca de Xira, a suburban town in the big periphery of Lisbon. During the XX<sup>th</sup> century, the small village of Alverca has gone from a rural area, to enter a process of fast industrialization in the sixties and early seventies, to finally, a de-industrialization reflux in the last decades of the century.



© Google Maps

**Figure 15 – Lisbon and Alverca's map**

Nowadays it is mainly a dormitory, where most of the residents must look for work elsewhere.



**Figure 16 – Folk Group performing at NMA's entrance**

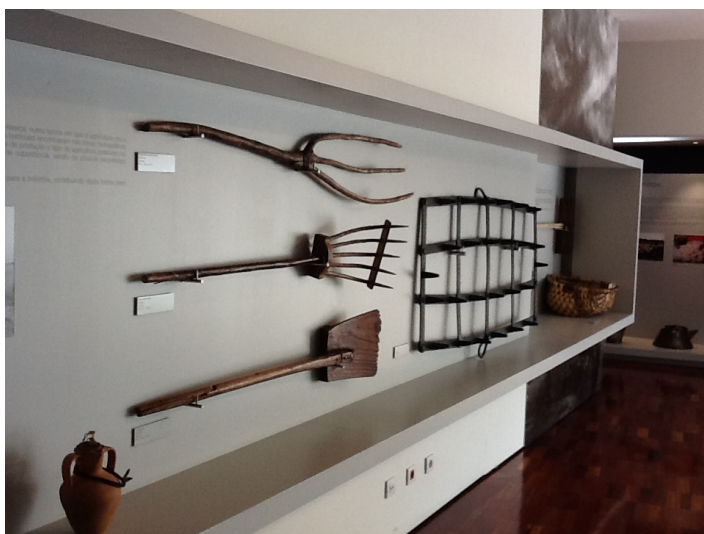
The Núcleo Museológico de Alverca occupies an eighteenth century building that was household of the town's municipality. During the time of our fieldwork at this case study site (2013), this museum had an annual visitor turnout of just over 2000. The NMA opened as museum pole in 1990, but knew substantial renovations and a new museological project, reopening in 2007. Its collections are mainly archaeological, telling the story of the site's occupation since the Palaeolithic, and reserving a small room for objects related with the village rural past. But the most interesting feature is, in our opinion, usually its one-year long exhibitions, depicting Alverca's recent social history, that call for the community's enthusiastic participation.<sup>76</sup>

The Núcleo Museológico de Alverca was the second Case Study and was, from the outset of the collaboration, a very willing research partner.

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<sup>76</sup> At the time of our fieldwork, the last two temporary exhibitions had been 'A Nossa Escola'/'Our School' and Brincadeiras de Criança/'Childhood Plays'.





© Melo

**Figure 17 – Ethnographical display at NMA (Permanent Exhibition)**



© Melo

**Figure 18 – Display from the Temporary Exhibition  
'Brincadeiras de Criança' / 'Childhood's Play'**

#### 4.2.5. Sampling Procedures

As explained in the introduction Chapter, the decision to work with older adults was part of the research design of this thesis. The conceptual intention was to investigate a pre-determined sociological age group who had made their first formative years during the political, social, economic and cultural conditions of the authoritarian Portuguese regime known as Estado Novo. Thus, the sample envisioned should have individuals over 45 years old, from both genders and with no pre-determined socio-economical background.

Another distinct point of approach to the sampling design was the delimitation of potential participants to adult individuals who paid several visits (at least 2) to one of the selected case study museums<sup>77</sup> in the previous 12 months, and that could be easily identified as frequent visitors by the case study museum. The research set out to complement a common approach within the field of visitor studies research, which tends to favour interviewing adults that cross the museum's doors for an occasional visit<sup>78</sup>, or to simply collect statistical data profiling their visitors with broad stroke categories<sup>79</sup>. Conversely, this research project was focused on examining the particularities of an individual's multiple visits to the same museum over time.

This initial delimitation became a clear conceptual framework to the subsequent research. Defining the research in such a way, was

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<sup>77</sup> Initially there was the intention to include a third case-study, however, when it came to start fieldwork, it became clear that purposeful sampling would be impossible, as the museum could not identify visitors that fitted the criteria. With this thesis supervisor's permission, we decided to work with the remaining two case-studies.

<sup>78</sup> Everett & Barrett (2009) consider that most of the research still explicitly focus on 'single visit' paradigm.

<sup>79</sup> Watson's observation is relevant to our argument: 'These visitor profiles tell museums some basic information about the people they attract. However, while demographics and socio-economic factors can help museums target their audiences and understand why certain displays appeal to some and not others, it is doubtful whether this form of categorisation helps museums understand the complexities of the communities they serve.' (Watson 2007: 5).

grounded on the preliminary, and aprioristic, assumption that Portuguese Local Museums have a particular impact in their vicinity communities, and that would be expressed in a different type of bond between the museum and their frequent visitors. This connection, we anticipated, had to be one of a distinct nature from the one National Museums are fostering (even different from the one they establish with the more or less formal 'Museum Friends' groups, these big museums tend to have).

Thus, when reading Michele Everett and Margaret Barrett's article, 'Benefits Visitors Derive from Sustained Engagement with a Single Museum', resonances were found with this thesis distinct view of the binomium Visitors/Museums. Their conceptualization of the 'sustained engagement' relationship adults can maintain with a specific museum became pivotally clear to our own approach to the subject and played a vital role in the sampling design.

According to these authors, 'the concept of sustained engagement, in the museum context, has not been formalized in the literature' (Everett & Barrett 2011: 432), and most of the research has focused on single visits, even when using subsequent research tools (such as follow-up interviews). In this sense, their investigation, focusing on seven individuals and describing the relation they maintain with a single museum over different life stages, is a significant contribute to start unravelling visitors sustained engagement with a particular museum.

With this ideal sample in mind, contacts with the selected case study museums were established, setting appointments with the director of each site, thus securing full collaboration from the institution's management.

Next, a process of purposeful sampling (Patton 2002) followed, with the purpose of selecting research participants<sup>80</sup>. As mentioned above, the research design called for participants with a sustained engagement with one of the case study museums, and two different, but complementary, strategies were used with the aim to identify them. First, the museum's staff was invited to collaborate and help to identify museums visitors that they recognised as 'familiar faces'. Secondly, we engaged in several of the museums' activities (openings of temporary exhibitions, seminars, and 'cultural visits') with the intention of recognising other possible participants. By these means, a total of 23 participants in both museums were selected.

A list of potential participants was elaborated, and subsequent contact was established either by telephone, either, in some cases, directly during their participation in a museum's activity. Some participants had been previously approached by the museum staff informing them, in broad terms, of my interest in interviewing them. Two participants who, at first, agreed to participate in the research, later preferred not to engage in the study.

So, the final sample contained 20 participants<sup>81</sup>, 10 from each museum. It had 13 women and 7 men, whose age ranged from 45 years old to 81, with an age average of 64 years old throughout the sample. Approximately half of the sample had 4 years or less of formal education. The rest of the sample had different levels of formal education, from technical secondary education, to university degrees. The majority of the participants was no longer in active employment.

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<sup>80</sup> Hollingsworth & Dybdhal propose that narrative inquiry with a constructivist framework should select participants 'who reflect the theoretical frame' (2007: 150)

<sup>81</sup> In fact, 21 participants were interviewed, but only 20 fitted the profile in terms of sustained engagement over a considerable period of time. One of the participants had only started to attend some of the museum programs in the previous 2 months.

Again, the sample design was intrinsically linked with our qualitative approach. 20 participants are arguably a small number if the project aims to gather statistical data with generalisation intents. However, in qualitative studies, particularly in ethnography and in narrative inquiry, it is common to find similar or even smaller samples. For instance, Hooper-Greenhill and Moussouri's research at Wolverhampton Art Gallery and Museum interviewed eighteen individuals, as they made their visit at the exhibitions (2001: ii), and Marjorie Shostak's seminal work, *Nissa: The life and words of a !Kung Woman*, relies on a single key informant (1981). Also, the previously cited narrative inquiry research lead by Everett & Barrett (2011) engaged 'only' seven participants.

#### 4.2.6. Data collection through Narrative Interviews

Inspired by Watson's call for 'sensitive methodologies' for consulting and working with the museum communities (Watson 2007: 10), and being a novice researcher doing in-depth interviews for the first time, led to a search for, not only a technical approach to the practicalities of performing good interviews – for instance, taking advice about the best way to record and store the collected materials, or the correct body posture during the interviews –, but mainly for a suitable theoretical framework that could help recognize the potential of interviews as a data producing technique, as well as its inherent limitations.

From the outset, Hermanowicz's (2002) paper on '25 strategies to a great interview' clarified that an impressive interview is richly detailed and allows for a thick understanding of the issues debated. It gets to the core of the person interviewed. In his paper, Hermanowicz points out to attributes that later resonated in the exploration of the narrative interview's approaches: for instance, the relational aspect of the interview, that can be summarized as a meaningful conversation. As Hermanowicz states:

A great interview explores meaning. [...] The search for meaning is the major reason to use the interview method and qualitative methods generally. [...] Meaning uncovers how people make sense of themselves – how they know themselves and the perspectives they have adopted to achieve this self-understanding (Hermanowicz, 2002: 484).

This appreciation of research interviews as a meaning making processes not only for the researcher with clear research aims and objectives, but also for the interviewee who, through this meaningful conversation, can follow a reflexive path of self-awareness, led us to the work of Steiner Kvale (2009), for whom:

Interview knowledge is produced in a conversational relation; it is contextual, linguistic, narrative, and pragmatic. (...) Rather than locating the meanings and narratives to be known solely in the subjects or the researchers, we argue in this book that the process of knowing through conversations is intersubjective and social, involving interviewer and interviewee as co-constructors of knowledge (Kvale 2009: 18).

In Kvale's reasoning, the interviewers 'are not merely "tape recording sociologists", to use Bourdieu's expression, but actively following up the subject's answers, seeking to clarify and extend the interview statements. This involves posing difficult questions [...], obtaining reasons [...], and challenging' the interviewee preconceptions' (Kvale 2009: 7).

Similarly to Steiner Kvale, the researcher Elliot Mishler was one of the first to regard research interviews as the crafting of meaningful stories through the 'joint construction of meaning' that occurs during the conversations between interviewer and interviewee. (Mishler 1986: 52) In his influential book on the topic of research interviewing, Mishler urges for: 'the empowerment of respondents and proposes methods that respect their way of constructing meaning, which, in other words, is attentive to their voices.' (Mishler 1986: 143)

On the words of Mishler, stories are ubiquitous as they are 'natural cognitive and linguistic forms through which individuals attempt to order, organize, and express meaning.' (Mishler 1986: 106) Thus, he argues, interviews are also a mode of producing a meaningful story, woven from the interaction between researcher and research participants. Mishler's reflections influenced other narrative researchers, such as D. Jean Clandinin, who has edited a substantial volume on narrative research mapping the contributions of Narrative Inquiry to social research (Clandinin 2007).

### **Into the fieldwork**

After preliminary contact, either in person or by telephone, interviews were arranged at a convenient date for the participants. The venue for most of the interviews was the case study museum, except in a single situation, an older couple that asked to be interviewed at their home.

Interviews at the first case study museum (Museu do Trabalho Michel Giacometti) took place from May 2012 to June 2012; and at the second case study (Núcleo Museológico de Alverca) interviews took place from September 2012 to October 2012). The duration of the interviews varies from 17m46s to 5h21m10s, and they both corresponded to two different challenges: how to empower the participant so she/he believes that what they had to say is relevant, on one hand. And on the opposite side of the spectrum, how to maintain the interview relevant to our research, when the participant is eager to share an overly detailed account. However, the average interview is approximately 60 minutes long with a balance between answers to predefined questions and open-ended conversation.

As mentioned earlier, the interviews were conducted using a script (see Appendix 2) but not limiting the questions to the script. Embracing narrative interview encourage us to become responsive to the participants' line of thought.

The following tables present the interviewees and a summary of the interviews' details:



## Museu do Trabalho Michel Giacometti

Name	Gender	Age	Formal Edu.	Profession	Date	Duration
Isabel	F	52	Degree in Social Sciences (incomplete)	Administrative	24.05.2012 25.05.2013	1h08m49s 1h23m33s
Adelino	M	81	4 <sup>th</sup> grade	Carpenter (Retired)	15.05.2012	48m53s
Augusta	F	64	4 <sup>th</sup> grade	Kindergarten assist. (Retired)	16.05.2012	41m26s
Manuela	F	45	Secondary School	Unemployed	15.05.2012	40m50s
Erminda	F	75	9 <sup>th</sup> grade	Administrative (Retired)	15.05.2012	50m37s
José	M	59	Degree in Economics	Manager (Retired)	22.05.2012	1h31m15s
Luís	M	55	11 <sup>th</sup> grade	Journalist	29.06.2012	53m52s
Maria	F	69	2 <sup>nd</sup> grade	Domestic staff (Retired)	16.05.2012	17m46s
Maria J.	F	55	Master degree in Humanities	Teacher	31.05.2012	1h10m40s
Pedro	M	66	4 <sup>th</sup> grade	Photographer (Retired)	22.05.2001 2	5h21m10s (3 days)

**Table 1 - Summary of the interviews details at the MTMG**

## Núcleo Museológico de Alverca

Name	Gender	Age	Formal Edu.	Profession	Date	Duration
Arminda	F	65	4th grade	Seamstress (Retired)	19.10.2012	1h03m01s
Arnaldo	M	64	Degree in Economics (incomplete)	Administrative (Retired)	11.09.2012 16.04.2013	1h37m05s 42m12s
Artur	M	64	Secondary School (Vocational)	Aeronautical and naval industries specialised worker (Retired)	26.09.2012 23.04.2013	1h45m 1h36m55s
Jorge	M	71	Secondary School (Vocational)	Marketing senior officer (Retired)	18.10.2012	1h51m06s
Jacinta	F	63	4th grade	Telephone operator (Retired)	16.10.2012	1h04m15s
Vitalina	F	72	3rd grade	Domestic staff (Retired)	16.10.2012	50m59s
Margarida	F	60	Secondary Education	Receptionist (Unemployed)	25.09.2012	1h02m33s
Luísa	F	67	4th grade	Concierge (France) (Retired)	13.09.2012	1h03m
Maria	F	59	4th grade	Telephone operator (Retired)	13.09.2012	39m08s
Maria J.	F	65	Secondary school	Administrative Staff (Retired)	09.10.2012	49m02s

**Table 2 –Summary of the interviews details at the NMA**

Six months after finishing the first round of interviews (between April and May 2013), and wanting to further explore the possibilities of the narrative inquiry approach, another set of interviews with a very limited number of participants was undertaken. This additional method was again inspired by Everett & Barret's research which used 'guided tours' led by participants to 'probe individual relationships with a museum' (2012: 32).

After listening and analysing the overall recordings, three participants were selected based on what can be defined as a deep and sustained engagement with the case study museums, expressed by the number of years their visits have been occurring and by the frequency of their visits. The new interviews were presented to the participants as guided visits to their museum to be conducted by them with no set script. A completely open-ended conversation, that was prepared by listening and coding the previous interviews, was envisioned. Two Interviews were conducted at the NMA and one at MTMG. Participants guided the visits, expressing their opinions, feelings and preferences by using the museums rooms and objects as contextual clues for their engagement.

In addition to the visitors' interviews, 4 members of staff from both museums were interviewed using an individualised script for each one (see Appendix 1). Contrary to one of the initial aims of this research project, that included the intention to understand the organisations' response to their adult visitors, these interviews were not treated as primary data (they were not coded, nor was any attempt to conceptualised them made). In fact, they were used as secondary data, enhancing our information about the museum and their activities, and also as an insight regarding these museum professionals' opinions about the Portuguese museological system, particularly on what concerns its local museology. They also served to cross-check other secondary data, such as printed and online materials about the institutions.

#### 4.2.7. Personal impact on the methodology

As previously mentioned in the introduction Chapter of this thesis, there were several reasons calling us to undertake this research. From the considerable gap in Portuguese Museum Visitors research, to our specific interest in Local Museums, and the New Museology inspired experiences in Portugal, to assumptions regarding culture democratisation and its political stake. This array of motives has certainly impacted in the research design, as our own personal attributes may have impacted on participants' responses. For instance, the status of being a researcher doing a PhD may have restrained some participants who might have felt uncomfortable, given their sparse years of formal education. On the other hand, some participants, may have felt they needed to 'prove' they were 'worthy' enough to be featured in the research and may have over emphasised some aspects of their engagement. Whatever the case may have been, the narrative inquiry inspired approach that underpinned this research revealed its usefulness by stressing the need to improve the relational quality of interviewer and interviewees (Everett & Barret 2012: 33). For instance, through a process of 'respectful dialogue'. Golding (2009: 19) argues that the researcher should not only show consideration for the participant's own timings, accepting their silences, encouraging their thought processes and critical reflections, but also that revaluing their expertise can help impart a stronger sense of pride on their experiences and life achievements. We will return to this matter in this Chapter's ethical considerations section.

### **4.3. Analysis of the interview data through Constructivist Grounded Theory and Narrative Inquiry**

This thesis's exploratory nature was underpinned by the decision to code the generated data using a Constructivist Grounded Theory<sup>82</sup> inspired approach. The analysis of the qualitative data gathered was mainly inductive as we did not tackle it with a predetermined theory, nor with a rigid set of assumptions. In this sense, using Grounded Theory allowed us to produce codes and, subsequently, categories and themes that are deeply embedded in the data from which they have emerged; unlike a 'content analysis' approach in which categories would have been previously defined.

For the sake of rigour, it is also important to acknowledge, as Saldaña observes (2013), that the interpretation process in all open-ended interviews does not have clear-cut boundaries. In fact, it started intuitively during the interviews, as the new and un-scripted questions are triggered by the meaning constructed from the participant's previous responses. After each interview an analytic memo was produced and was later used in combination with the coded interviews, for instance, by cross-checking our later interpretations with our immediate impressions.

Although this thesis has worked with a relatively small number of participants, the interviews that were conducted have produced 1719 minutes and 6 seconds of sound recordings. Thus, over 29 hours of recordings were transcribed verbatim noting not only the exact words and occasional mispronunciations but also, the embodied responses such as laughter, choked voice, silences, etc. This allowed for an

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<sup>82</sup> Grounded Theory is a qualitative methodology design in the 1960s by the sociologists Anselm L. Strauss and Barney G. Glaser when studying illness and eminent death. Their work was followed by Juliet Corbin, Adele Clarke and Cathy Charmaz.

additional layer of interpretation, classified by Saldaña as ‘Affective Methods’ (Saldaña 2013: 59).

As for the contribution of Narrative Inquiry to this research’s interpretation process, that contribution is visible in our determination to understand the participants’ words in the context of their own biographies. The narration of their lives’ storyline provided an essential background for our interpretation endeavours, which aimed to find significant meaning, not only, transversely throughout the set of our data, but also, looking for internal coherency inside each individual’s story. Our main digress from Narrative Inquiry’s interpretation practices can be found on the absence of the participants’ feedback. Unlike most Narrative Inquiry projects, the analysis undertaken was not the result of a collaborative effort between the researcher and the enrolled participants, but the outcome of a more conventional solo interpretation exercise that was due to the specificities and limitations of a PhD research, project conducted by distance learning over a period of seven years.

#### 4.3.1. Coding Process

As mentioned previously, our approach to the data was chiefly inspired in the Grounded Theory dictum of letting the codes emerge from the raw data, by using the participant’s own words to convey what we understand as the main issue. Using this elemental method of coding contributed to our intention of ‘priorit[ising] and honour[ing] the participant’s voice’ (Saldaña 2013: 91).

Although electronic coding was considered, for instance using the InVivo software, we opted for manual coding. This decision was two-fold. First, we were not familiar with the software, and second, as a novice researcher coding for the first time, we followed Saldaña’s suggestion to experiment with manual coding first, as a way of, by

physically manipulating the data on paper, gain more ‘control and ownership of the work’ (Saldaña 2013: 26)

Thus, we started our coding process with a first cycle of coding, applying ‘In Vivo codes’ (Saldaña 2013: 91) line by line or to bigger units of text as relevant. We left un-coded passages that raised issues of privacy. We did this first procedure to each of our interview manuscripts, from both case studies. Then, for the sake of organisation, we felt the need to convert the text documents into Excel tables, applying a second code to the raw data. We coded the emotions and the values present in the words, silences and gesture of our interviewees. This additional layer of coding falls under what Saldaña has categorised as ‘Affective Methods of coding’ (Saldaña 2013: 105), which are particularly helpful when the researcher wants to explore not only the ‘feelings participants may have experienced’ (Emotion Coding), but also to assess ‘a participant’s integrated value, attitude, and belief systems at work’ (Saldaña 2013: 105). We have found this additional coding practice to be particularly appropriate to explore the participant’s cultural values, identities, and interpersonal experiences.

Both the initial pen-on-paper In Vivo coding and the following Affective Coding were done by complete immersion in the raw data, as we were simultaneously reading the scripts and (re)listening to the recorded interviews.

#### 4.3.2. Interpretation Procedures

After completing this First Cycle Coding (Saldaña 2013: 58) a process of ‘category building’ commenced. Moving from the initial eminently descriptive and data-rooted codes a Second Cycle Coding was initiated. In the words of Saldaña: ‘the primary goal during Second Cycle coding is to develop a sense of categorical, thematic, conceptual, and/or theoretical organization from your array of First Cycle codes.’ (Saldaña

2013: 207) Thus, an analytical process of refining the vast array of codes, gave place to the sorting and clustering of ‘seemingly alike things into the most seemingly appropriate groups’ (Saldaña 2011: 91), looking for connections throughout the data and establishing possible similarities and patterns. In turn, that analytical endeavour, expressed in the construction of meaningful categories, gave place to the final moment of interpretation: the consolidation (based on our understanding of those categories) of this thesis major themes and of its key argument. This moment can be described as our individual final effort to find a deeper meaning in the research.

Wolcott (1994) described these three levels of data meaning making in the following way:

When you emphasize description, you want your reader to see what you saw. When you emphasize analysis, you want your reader to know what you know. When you emphasize interpretation, you want your reader to understand what you think you yourself have understood. (Wolcott 1994: 412)

Before writing up our findings, to assure robustness of our analysis, an additional methodological step was taken through the elaboration of Code Landscapes (Saldaña 2013: 199), commonly known as Word Clouds. We used a free online content analysis software (WordClouds.com) pasting the transcriptions (in its original language – Portuguese) and initially creating separate code landscapes for both case studies. Taking this action, not only reassured us of the appropriateness of our codes and categories, but also corroborated our impression about the similarities across both case studies and of the validity in presenting the findings thematically.

Although the first Grounded Theory mentors advocated for a completely unbiased, uninformed, almost ‘pure’ approach to the raw data, it is our



understanding that those conditions are virtually impossible. All researchers, even novice ones, come to the research from a specific field or area of expertise and read reality with distinct lenses. In the beginning of this Chapter we have tried to clarify some of our own, in terms of our ontological and epistemological beliefs. It is also right to assume that, although we have tried to stay true and to honour our participants' voices, we irremediably interpret them in connexion to a vast specialised museum studies literature, as well as our own personal background. We believe that this does not diminish their contributions, but simply enables us to frame them within a vaster theoretical discussion.

## **4.4. Ethical Issues**

### **4.4.1. Ethical Committee Approval**

This thesis followed the guidelines of the University of Leicester Research Ethics Code of Practice and the Museums Association Code of Ethics, and obtained the University's Ethical Committee approval.

### **4.4.2. Ethical Issues during fieldwork**

Following the regulations of the University's Committee of Ethics, before going through with the research interviews with the selected participants, firstly informed consent was obtained (see appendix 4). A written declaration stating the purpose of the research, establishing the possible uses of the material collected, and the possible ways in which the final product – the thesis – could be publicised, was presented and explained to each participant. Participants were fully aware that they could, at any moment, withdraw consent, either total, or partial consent to specific passages of the recorded interview.

The consent to participate was completely voluntary, and participants were not, in any way, coerced to give consent, nor given any kind of material compensation for their participation.

Confidentiality was granted through the warranty that the researcher would be the only person who would access the recorded materials. Whereas, anonymity was proposed to each participant, interestingly, only one participant decided to be anonymised.

The nature of the research, and the fact that it was working with adults, did not pose any special concerns regarding potential associated risks. However, what was not anticipated by the researcher, nor supposedly the participants, was the highly personal nature of some of the testimonies. In such cases in which the topics disclosed were of a

very sensitive nature, we opted not to transcribe them in any form. Another unexpected ethical issue was the emotional distress some participants experienced by the fact of going through their childhood memories. In those situations, we believe we have acted with empathy and respect, giving the participant time to regain control over her/his biographical account and to feel comfortable again. Again, participants were asked if they wanted to end or pause the interview, which they did not.

#### 4.4.3. Ethical decisions in the final writing-up

Except for one of the participants, who opted to be anonymised, all the other participants whose contribution is quoted in this thesis are referred to using their own names. During our conversations with the participants we recognised that using their names was a way of enhancing the value of their contribution to this thesis.

#### 4.4.4. Possible benefits for the participants.

‘Empowerment and educational benefits can also stem from participants having an opportunity to re-story their experiences as they narrate. This involves a process of reflection, recalling, remembering, reimagining – it is a process of putting the pieces together, and may be very beneficial to participants (Leavy 2011: 83).

Following Leavy’s insight, it is this thesis’s understanding that, although participants may have experienced moments of emotional vulnerability, they have generally benefited from participating in this thesis fieldwork. In the end of each interview, participants often expressed their gratitude for having been listened to, reflecting on how uncommon that was in their lives. It is our belief that the participant-sensitive approach which has been used has the potential to transfer some of the power to the interviewee by valuing the centrality of their

participation to the research and by recognising the individuality of their voice. Concurrently, although we aimed to remain truthful to the participant's voices, we could not lose sight of how this research project was also about finding our own academic voice.

Over this Chapter, we have presented this thesis methodological approach and the theoretical framework which underpins it. We have also presented our case studies, our sampling procedures, described the fieldwork undertaken and introduced our interpretation procedures. We will now proceed to Chapter Five, which will present and analyse the research data and what we consider to be our key findings.

## **Chapter Five: Data analysis and findings: Identity work in museums**

When people talk about their lives, people lie sometimes, forget a little, exaggerate, become confused, get things wrong. Yet they are revealing truths ... all autobiographical memory is true: it is up to the interpreter to discover in which sense, where, and for what purpose (Passerini quoted in Golding 2009: 118)

Act the way you would like to be and soon you will be the way you act!  
Leonard Cohen

### **5.0. Preamble**

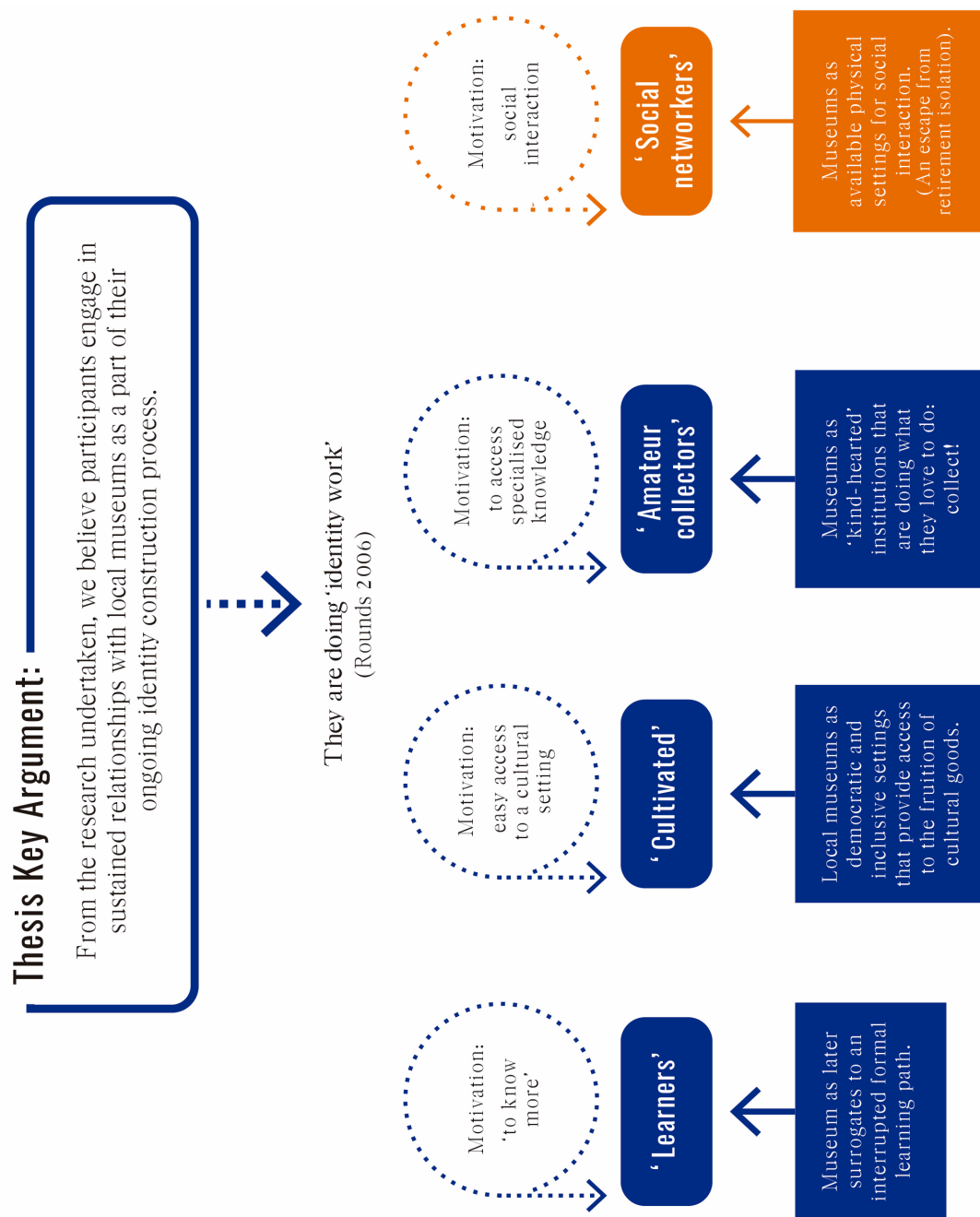
During the analysis of the data across the two museums, it became clear that the emerging data-grounded categories overlapped and were operational in both research contexts. Concurrently, and believing that a thematic approach to the writing up of this thesis findings could be richer and more revealing than a separate case study description, it was decided that the present data analysis Chapter should be organised thematically from the outset of its key argument – the one that the participants in this study engage in sustained relationships with local museums as a part of their ongoing identity construction process, to the remaining fundamental analytical categories this thesis came to recognise.

## **5.1. Findings - Key Argument of the Thesis**

Grounded on the data collected, this thesis proposes that participants engage on sustained relationships with local museums as a part of their ongoing identity construction process. They choose to participate in the museums' different activities over an extended period of time as a self-identity strategy, which allows them to construct, maintain and change their idea of selfhood. This notion of selfhood relates to their set of core values, beliefs and attitudes, which every human being starts building from early childhood.

From the analysis undertaken in the case study museums it became plausible that participants' identity work could be clustered into three major categories, coined as: 'Learners'; 'Cultivated'; and 'Amateur Collectors'. A fourth category was also recognised, labelled as 'Social Networkers', which exhibits a set of differentiating characteristics, starting with a less evident level of engagement with the museum setting. This fourth Cohort will be addressed over Chapter Six.

A schematic visual summary is provided in Figure 18:



**Figure 19 – Key Argument of the Thesis<sup>83</sup>**

<sup>83</sup> The 'Social Networkers' cohort will be explored in Chapter Six, given the distinct characteristics recognised.

As already described in detail in our methodology, Chapter Four, in combination with the Grounded Theory inspired approach to our data analysis we also resolved to experiment with a complementary method of analysis. We used the Word Clouds tool as a method to triangulate and verify the validity of our findings and to assert the correctness of the decision of merging the two case studies. The result of the combined Word Cloud is presented in Figure 2:



**Figure 20 – Combined Word Cloud for the research data**

We will now proceed to a deeper examination of these findings looking in detail and supporting our assertions with direct quotes from our data. We will start our analysis with the *Learners* category, which is the most pervasive in our data, as can be inferred from the Word Cloud above.



## 5.2. Identity Categories

Our categories are presented as nouns and not as the actions they imply (learning, cultivating, collecting) as a thesis should aim for abstraction and conceptualisation. Thus, the identity work they do (their actions) is based on the fostering of the self-identities they have chosen / have been choosing throughout their lives.

For an easier reading and understanding of the Portuguese Educational System of *Estado Novo* (Rosas 1994), many times addressed in the following section when relating to participants' formal educational years, we provide the following schematic table:

**Table 3 – Portuguese Educational System during *Estado Novo* (1936-1974)  
(adapted from Campos 2011)**

Educational Reform		Curriculum	
1936	3 years of compulsory schooling for boys and girls (7 to 10 year olds)	Reading, writing, basic maths, and Portuguese history	
1956  1960	4 years of compulsive schooling for boys. (7 to 11 year olds)  4 years of compulsive schooling for girls (7 to 11 year olds)	Reading, writing, algebra and geometry, Portuguese history	
1964	6 years of compulsive schooling for boys and girls (7 to 13 year olds)	After the initial common 4 years, students would be divided into two distinct paths:	
		<b>Secondary School:</b> Portuguese, maths, sciences, arts, music, French, religion/ Latin, English or German, Physics, Chemistry (second cycle)	<b>Technical School:</b> <ul style="list-style-type: none"> <li>• Commercial School</li> <li>• Industrial School</li> </ul>

A renowned historian of the period, Fernando Rosas, has suggested that the purpose of educational agenda of Estado Novo was to perpetuate the social *status quo* and to indoctrinate the values of the regime in its population. The historian recognised in the *Estado Novo* autocratic regime a combination of values that could be translated as ‘Family, Fatherland and Religion’ (Rosas et al. 1996: 303)<sup>84</sup>. Not surprisingly, in 1950 there was still a 40% illiteracy rate in the country (Campos 2011) and the subsequent changes brought to the system where due to a pressing need for more skilful workers for the post-war industrial peak (Rosas 1994: 440-455).

### 5.2.1. Learners

Throughout our data, we can easily find that the conversations with the participants frequently lingered on educational topics. That fact was partly imprinted on the outline of the semi-structured interviews – as part of the questions revisited the participant’s formal education path and also probed their views on the museums potential as valid and useful learning settings. Nevertheless, for some participants, we came to recognise a clear construction of their personal narrative, and particularly of their engagement with their local museum, in terms of the will to experience life as a learner, as someone who believes that the actualisation of their selfhood (or the self that they aim to achieve) is best served by experiencing the world as a perpetual ‘student’, always looking to enhance their knowledge of the world. That became manifest in the many variables of the expressions connected with learning and education, all grouped in the cited Word Cloud as ‘Learning’, ‘Education’ and ‘Knowledge’. It was with surprising frequency that they

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<sup>84</sup> A less academic version of the regime’s values can be found in the generalised notion of ‘Família, Fátima e Futebol’, which translates to ‘Family, Fátima (the religious site where St. Mary was supposed to have been seen) and Football’. These were the topic the regime used as propaganda to avoid political debate.

would draw parallels between their ongoing museum experience and their former experience as young students.

Furthermore, from our interpretation of the data, these participants are not looking for specialised knowledge, nor are they trying to master any particular topic (as in the case of the ‘Collectors’, a distinctive category which also emerged from our research). In this case, it is their openness and their eagerness to continuously keep adding general knowledge of the world to their previous mind frames that gives them this conceptual identifier. Concurrently, this research also recognised a possible link between the identity construction as learners with an extremely premature interruption of the participants’ formal education (just up to 4 years of schooling). This interruption was always due to poor economic conditions and it was always felt as a disappointment. Some individuals were later able to reclaim, as adults, their formal education paths, returning to school and completing elementary and secondary degrees. We will now look at several examples:

### **Ermelinda**

Ermelinda can be cited as clear example of an individual whose identity construction falls under this thesis category of ‘Learners’. Ermelinda was at the time of our interview a 75 years old woman, from Setúbal. She came from a poor background. Her parents were rural workers from the North of Portugal who migrated to Setúbal when she was ten. Initially, she just completed the first four years of Primary Education (compulsory under Salazar’s regime) and subsequently started to work. She had several manual jobs, and eventually started working at a school. First, as ‘playground staff’ and later as ‘back-office’ staff. She married and had two children and at the age of 40 she returned to school, completing five more years of formal education. She expressed her attraction to museums in these terms:

The museum is something else [different from other forms of leisure, such as visiting the countryside, or going to the beach], it gives us *knowledge*! Every time we go there we are always acquiring *knowledge*. [...] We don't go there for no reason, besides giving us the pleasure of a well spent afternoon, we are always acquiring some *knowledge*, as little as it may be. I agree with your question, I think museums are spaces of *knowledge*, of study... I think so, we always come *richer* after visiting a museum... I know a few [museums], we see things that takes us years to forget. And then we need to go again, because we need to *remember*. [E.V. MTMG] [author's emphasis]

Ermelinda's returned to school as an adult with the expectation to finally fulfil her childhood wish to proceed her education. She remembers that her primary teacher recommended to her father her continuance at school and how that left a permanent mark:

When I visit a museum I come out with added value. Enriched. We are not the same people when we leave [the museum], we acquire knowledge... that is real... We can't say we stayed the same, or indifferent, no one stays the same! We leave more knowledgeable, richer [...]. Because I didn't study as a child, I just did my primary education, afterwards when my children where older [...] I thought: "now that I have a little more time I will return to school! I will show that I also can do it!". Because *I was very sad not to continue my studies*, to move forward... In fact, my father was called to the school because my teacher thought I should go on with my studies, but my father, a rural man, thought that I already knew enough... *And I always kept thinking about that!* [E.V. MTMG] [author's emphasis]

Ermelinda first visited a museum as a teenager, the National Archaeology Museum in Lisbon. She still remembers her first impressions:

I remember the tombs. The ones just on the threshold. [...] I felt respect, respect. It is something I still feel today when I enter a

museum. I don't want to hear any noise, because I feel we need to pay respect to those objects. They are important, they are important! [E.V. MTMG]

At the time of our interviews she had been frequently visiting Museum do Trabalho Michel Giacometti (MTMG) for the last four years. She felt that she had fostered a deep engagement with the museum and the museum staff. She expressed that relationship comparing it to a family, to feeling part of a family, and revealing a profound 'sense of belonging' every time she entered the museum space:

I started coming with my husband, and now it feels as if we are *part of the family*. [...] We already feel at home. [laughter] ... we really feel at home, we are so *welcomed* here, by the staff, by Dr. Lucinda and Dr. [Catalão]<sup>85</sup>, that we feel at home! We will continue to visit and to participate. [...] I agree; I feel that the museum is partly mine. I don't know if I took it over, maybe I did take it over [laughter], but then I was so happy because I was so welcomed in my take over, that I am not going back! [E.V. MTMG] [author's emphasis]

During the interview, Ermelinda revealed that the main motivation behind her museum visits, in general, and to pay repeated visits to MTMG, in particular, was her need to keep on learning:

*Because we are never complete. We have to learn until we die. Just as the saying goes! We are never complete, because we are always learning new things, in our daily lives, and each time we go to a museum we also learn new things.* [E.V. MTMG] [author's emphasis]

However, contrary to some common ideas about adults' preferences when learning in museums (Falk, Duke 2010), Ermelinda favoured guided visits, with specialists, as opposed to browsing the museum on her own. She believes that these guided visits are the best way of

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<sup>85</sup> Members of the senior staff at MTMG.

making sense of a museum's exhibit, as the exhibition's contents are 'explained' to her:

The architect came to us and started explaining a few things, because sometimes we, on our own, do not see the museum properly, I think sometimes we do not get it! I don't know, it's not that I think I'm dumb, it is just that I think that there are things that really need to be explained for us to get them... because sometimes we don't grasp other people's line of thought and when it gets explained, one gets it! And that is important! [...] *No, I don't think it is a conversation, when we have a guided visit we get the concept, it is explained thoroughly.* And when I'm there I pay full attention, I put my little ears to action, so I can listen to everything, so I don't leave anything out. Although, sometimes, my head does not get to keep everything, as I would like to keep. But that's understandable, I'm not a young girl any longer. [...] We keep all that information and then we can start reading and we get it even better. Guided tours are great! They really help us! [E.V. MTMG] [author's emphasis]

Probed into if she thought the main difference with guided tours, as opposed to browsing the museum on her own, laid on the experience of the human interaction with the expert, she maintained her line of thought: she wanted things to be explained by experts because she wanted the 'correct' information. She needed the 'right' answers, much similarly to the classroom experience that she had been pursuing all her life. Ermelinda's way of learning in a museum can challenge contemporary beliefs on the subject: that adults prefer to browse exhibitions on their own, that when in a museum they do not like to be thought in a classroom style (Duke 2010), that the 'acquisition' of new information is not a top priority during a museum visit. However, and contrary to our own expectations, this study revealed that Ermelinda's view was not unique. Other participants expressed similar viewpoints as in the case of the following interviewee.

## **Manuela**

Manuela was, at the time of our interview, a 45 years old woman from Setúbal. Similarly to Ermelinda, she was born in a different part of the country, the Northeast, and then migrated with her family to Germany where she completed her formal education, as a hairdresser trainee. After which, she moved back to Portugal and established herself in Setúbal, where she had been living for the last 27 years. As a disabled person (she was born with only one arm), she never managed to find a job as a hairdresser in Portugal. She got married and has been working at home for the past decades.

In this thesis taxonomy, Manuela can be classified as a hybrid, in-between the Social and the Learner categories. Whilst her main motivation to engage in the museum's activity is of a social nature (she started participating in the museum's programmes as part of a group, after her husband's retirement); when directly questioned, she named learning as her prevalent motivation to visit museums and to be engaged with the programme at MTMG. We will later in this Chapter return to Manuela when we address the Social cluster, but for now we will quote her on the subject of guided visits:

Here [at the MTMG] we have a wonderful guide. He has an amazing *brain*... For instance, I went on my own to Santiago de Compostela. And it was amazing, but I felt that I could have learned so much more if I had a guide. They would have explained me everything ... how it was, how it is, how it was made, what it represents. Everything! And this way I only got to grasp what I could understand on my own, with limited experience! [M.F. MTMG] [author's emphasis]

Throughout our interview, Manuela made frequent allusions to her search for new insights when visiting museums. She believes museums provide her unique learning opportunities:



It's beautiful because every museum has a story. Stories that we have never heard of. It's incredible and completely different from everything else. It's beautiful! [...] we adults have a lot to learn [...] *especially if we didn't have the opportunity to see it as a child, we have to learn it as an adult*. To see our history, the history of other people, other people's culture that you can find in some museums, it's amazing! [M.F. MTMG]  
[author's emphasis]

When asked if she visits a particular exhibition with specific learning intentions, she did not hesitate:

Yes, because there are things that I don't know. Or that I don't know that well... and so I go looking to find out a bit more... because I think it's cool *to know* what our ancestors did, to *understand* how it shapes the present, the entire path... I think those are beautiful stories and I guess I come out more cultivated [laughs] I can't explain... I don't know... it takes me out of... I don't have words to say it... well, because it's beautiful, a person gets *cultivated, educated*, that's it! [M.F. MTMG]  
[author's emphasis]

Like Ermelinda, Manuela establishes some parallels between her learning experiences in the museums and her previous experience as a student. She highlights the gathering of new information, and she compares museum visits to lessons she can take. In this sense, museums offer themselves as surrogate institutions for the learning they believe they have missed. Although Manuela had been given the opportunity to continue her education once her family moved to Germany, unlike Ermelinda who was forced to quit school as a child, nevertheless, we can interpret from her words that she feels something is amiss. Maybe her moving to Germany left her with a sense of not being completely in tune with what she was supposed to know as a student, or maybe the vocational educational path did not fulfil her expectations to make her someone 'educated' enough.

Consequently, despite the differences (including the 30 years that separate them both) it is this thesis proposition that both Ermelinda and Manuela (as well as other interviewees that we will examine later), use their repeated museum visits as a strategy for a particular identity work, the one where they are re-affirming themselves as learners. The way these two participants refer to their learning expectations and experiences in museums is much in tune with what Hooper-Greenhill (2012) described as the 'Transmission Model of Communication' in museums – previously explained in this thesis literature review section. When Manuela and Ermelinda examine the quality of their learning by the quantity of new information they have 'acquired' they are, concurrently, reproducing what Freire ([1970] 2000) coined as the 'banking' model of education, the educational expression of the transmission model.

It is important to notice the links these participants establish between their learning experiences in museums and the educational paradigm they were immersed in. The transmission model that they had been introduced in the classrooms during their childhood is now being used to reproduce, evaluate and validate their learning experiences in museums and, consequently, to reinforce their identity as 'suitable' learners. A similar connection between visiting museums and revisiting childhood classrooms can be found in the words of the interviewee Augusta.

### **Augusta**

Identically to Manuela, Augusta primarily belongs to the Social cohort of this thesis taxonomy. From her interview, we can assume that the main motivation behind her sustained engagement with MTMG is her need for social connectedness. A desire to participate in group activities and to benefit from interpersonal relationships. Nevertheless, her reflections about her learning experiences can be relevant to what we have been describing.

Augusta was at the time of our interview a retired 64 years old woman from Setúbal. She left school after 4<sup>th</sup> Class and took care of her younger brothers and sisters until she started to work. She worked most of her life as a nursery and pre-school assistant and, for that reason, she made frequent visits to museums, art galleries, zoos and parks with the children. She declared herself fortunate to have had such an experience, especially given the costs that are usually involved with the consumption of cultural goods in Portugal:

Most people don't have the same opportunities as I did. I visited many things because we went with the nursery. We would make many visits. I would always return very happy because I love it. We would go to the Zoo every year. It is very expensive to go there [it is situated in Lisbon] between bus tickets and entrance fees I would spend a substantial part of my monthly groceries' budget. [MTMG ACP]

After retirement, and mostly as a way to escape solitude she started to participate in the MTMG activities. When remembering a recent guided visit to a heritage site just a few kilometres away from her house she said:

The knowledge, the knowledge... when Luis [senior staff of MTMG] goes with us we start *knowing dates*... things that I didn't know about the castle [Castle of Palmela] and now I am more knowledgeable, I can explain things to my sister... I don't know... it is as if *I go to school and learn new things* [laughter]. [MTMG ACP] [author's emphasis]

Similarly to Ermelinda and Manuela, Augusta establishes a link between her learning experiences in museums with an idealised paradigm of what learning should look like: it should be about 'facts and figures'; it should be about the gathering of new information. It should continue to reproduce the formal, transmission model she was introduced to at school and had seen prematurely interrupted. Then,

after ‘acquiring’ the new facts and figures about the visited sites and objects she moves on to share that information with her significant others: her sister, her son, her grandchildren:

My mother used to say that we learn until we die. And we have to transmit it to our grandchildren. When I am with my family, I always tell them to go here or there, where I’ve been with the Dr. [Luis Catalão, senior staff at the MTMG] and it is beautiful. [...] and I introduce that to my family in conversations when we are together. [MTMG ACP]

This sharing of information may be interpreted as a need to reassert herself as credible learner and as someone whose knowledge can be admired. It may suggest that she shares her new insights with her family not only as a way to value their common heritage, and to pass on the memory to the younger generations, but also to affirm herself as a valuable source of relevant information, despite her feeble schooling.

In the former three examples, we explored the contributions of three women all from our first case study museum, Museu do Trabalho Michel Giacometti. However, the examination of the contributions of other interviewees, of a different gender, and from our second case study museum, have shown us that there are parallels to be drawn and similarities to be recognised.

### **Artur**

At the time of our interview, Artur was a 64-year-old man from Alverca. When he was born, this small village in the outskirts of Lisbon was going through a rapid process of urbanisation and industrialisation, having been up until the mid-twentieth century essentially a rural town. Artur was born into a family of small land owners, mostly dedicated to agriculture and the primary sector. After losing his father at the age of 12, he was forced to leave school having completed only

the first four years of elementary education. He had already started to work at the age of 10 serving coffee to the early fruit-mongers and other traders at the town's market. His mother had decided that he should learn a trade, not wanting him to work in the insecure field of agriculture. For this reason, he initiated an apprentice job in the recently opened 'state of the art' aeronautical plant in Alverca. He was 14 years old. The apprenticeship was demanding and included training in school subjects such as mathematics and physics. Having very successfully completed the initial training he decided to return to school, combining a full-time job with night classes. Struggling in the first years to accompany the exigency of the curriculum, he managed to finish his five-year industrial course with excellent grades. Over the years of his professional life he worked in the aeronautic industry and in the naval industry, and was always interested in its technical aspects. He retired having reached the top of his career as a senior technician.

Looking into his attraction to museums Artur emphasises his fascination for science related issues:

I was raised in the countryside until I was 9. Contrary to what happens now with our youngsters, I was forced to build my own toys and I was forced to look at some old artefacts for inspiration. To see how they functioned. Maybe that fact served as a motivation to look at museums and because of my profession and because I love maths and physics all those [museum] objects helped me to *understand*, to find the origins of things... For instance, in the naval industry I could see that things that were historical artefacts were still used today, or that the origins of things that we use today can be traced back in time to our ancestors. To look back [when visiting a museum] makes us recognise that knowledge. And that is important. [...] To understand how those navigators [in the Sixteenth century] were able to look at the stars and to find their way, there was no magnetic needle... they can serve as an example. [NMA AF] [author's emphasis]

Artur's life story has similarities with our previous examples. Artur comes from a working-class background with limited access to cultural experiences. He was also subject to an interrupted educational path although he managed to return to school and complete a vocational education (secondary level), just as Ermelinda did, and he achieved a high position in his profession. Artur (re)defines his identity based on the valorisation of learning and on his attraction for science related issues. He constructed his professional career based on those preferences.

It is clear that Artur's professional career was dependent on actualising the knowledge he was able to develop within his field of work. Hence he had to assume a permanent learning attitude in order to keep up with the fast-pacing technological changes occurring over the past five decades. He witnessed the introduction of increasingly sophisticated technology, including the paramount change brought by the digital era. Nevertheless, it is also relevant to note that his sustained relation with the Núcleo Museológico de Alverca transcends his very practical and work oriented interests. He may be a fan of science, but he looks at this museum for other learning experiences:

It has been good for me to hear about an array of subjects [during the museum's small conferences program] about our town, about archaeology. When, for instance, the talk is about poetry I try to use what I've learn in my writing. Regarding that [his poetry] sometimes I surprise people, it is the same with my painting, I've always tried to do things myself. First, I have to identify a few things and then I try to do it. [...] I come here and I try to *acquire knowledge* so I can talk about things properly and do things right. Or at least try. [NMA AF] [author's emphasis]

During our conversation it became clear that, although Artur lived a professional life closely linked to technological issues, after his

retirement he started to explore other interests. He started painting, influenced by his wife, an amateur painter, and started writing poetry. His engagement and sustained participation in the museum's activities allowed him to develop those interests in a very pragmatic way. For instance, participating firstly as a member of the audience at the poetry sessions the museum organises contributed to the improvement of his poetry writing and gave him confidence to present his own pieces at later poetry sessions. He felt that he needed to learn how others do it and then apply what he had learnt in his own creative process. He became so engaged with this particular activity that he now helps the museum's staff putting forward the poetry sessions on a regular basis:

We started with a once a year all-day poetry session. Now we are doing it twice a year. [...] other people that write poetry, a friend brings a friend, we are all able to invite other people to participate [...] in the beginning people could read up to three poems, now we can only say one... [NMA AF]

However, a complete and comprehensive examination of Artur's account reveals how a taxonomic effort of category construction is always a somewhat artificial endeavour, as no human being can be described as pertaining to a single identity. We all are complex and multi-layered individuals and the risk of over-simplifying is always imminent. Hence the role of the researcher when trying to construct a valid interpretation is not only to stress the similarities but also to recognise the variations. So, whereas in this thesis we have interpreted Artur as someone who builds his identity based on his valorisation of knowledge, learning and science, it can be argued that at the same time he uses the museum to assert his identity as a learner (which he has been asserting throughout his life by overturning his initial underprivileged conditions) he is also developing traces of what we have categorised as the Cultured Identity which we will explore over the next section.

### **5.2.2. Cultured**

When analysing the data that emerged from the conversations with this thesis's participants it became clear that there was a second cohort of participants that although exhibiting some similarities with the Learner's cohort, also exhibit different attributes that are best understood using a different framework. We have called them the 'Cultured' and although they also stress the importance of general learning in their lives, and the learning motivation behind their repeated visits to their museum of choice, they firstly identify the need to feel part of a cultural setting, to experience cultural activities, and to be inspired by them as their key incentive to regularly participate in museums' activities.

#### **Artur**

Artur is a paradigmatic example of the intersections between two of the categories this thesis has identified: The Learners and the Cultured. As mentioned previously, Artur is a keen learner who has embraced life challenges by trying to keep up with a fast pacing changing world. Very soon in his life he came to realise that the best instrument to face those challenges was to maintain an openness and an eagerness to learn. However, if in the beginning of his youth his learning goals were very much oriented towards his profession and in fact they were concomitant – he returned to school as a consequence of the demands of his professional career; as his life path unfolded he also began to foster other identities and, as soon as his professional occupation came to an end, he started investing on a new set of skills. In his case cultural and creative skills. He began experimenting with painting. He became confident enough of his writing capacities to adventure in poetry and he found in the recently re-opened local museum a welcoming ground to help him foster those new identity-related skills.



His retirement roughly coincided with the re-opening and reframing of the Núcleo Museológico de Alverca in 2007; and at the outset of the remodelling works he stood curious and with benign anticipation:

I clearly remember the remodelling works, at the time many people criticised it because they thought it to be a megalomaniac enterprise and that the scarce resources should be spent on more pressing issues, some people just don't welcome change and many thought that museums are antiquated institutions that smell of mothballs... but I remained always curious, for a simple reason: I believe that museums are something I identify with because they are the guarantee of my existence. I mean, putting it in another way they are the guarantee of my past and of the past of my roots, of the continuity. And for that reason, I started coming to the museum as soon as it opened. [NMA AF]

By then he began establishing strong relations with the museum staff, particularly with the museum director who assumed a very open and community oriented attitude; welcoming feedback, suggestions, and finding the time to meet with individual visitors. It would be in this fostering environment that he began experimenting with some dormant talents:

From that moment on I started to venture in an area that was uncharted to me... or maybe not quite unknown, but to which I had never committed myself. I always had people, even colleagues and friends from my childhood, one of whom even worked here at the museum up until recently, that thought that my way of phrasing things was quite funny and nice. And I finally decided to start writing, start writing some verses, that some people tell me it's poetry. I started writing and I started to get excited.

I am also quite fond of painting and because I had some free time, not being employed, and that time – that some people find it to be dead time –, to me it *started being time of some creativity*. And the museum started to give me some support in my new endeavours. For instance, the museum, by collecting and archiving the pieces I have been writing,

has made me look at it as the warranty of a certain continuity, and as the *preserver of my identity* [NMA AF] [author's emphasis]

It may be argued that being in close and regular contact with a supportive cultural institution may have acted as the needed trigger for other aspects of his identity to unfold. Throughout his life, he had been appreciative of art and literature from afar, welcoming museums for capturing and preserving our common cultural legacy, but now he was starting to listen to his creative impulses, and that could have made him establish an even deeper engagement with this particular museum. On the other hand, it may be argued that for this engagement to happen the museum's attitude towards his newfound skills and creative drive was of pivotal importance. Artur's testimony may point us to ascertain that it may be in this 'in between space' amid the individual's expectations and the institution's support that the sustained engagement can flourish.

We will now examine other aspects of the Cultured cohort by introducing other participants to our analysis.

### **Isabel**

At the time of our first interview Isabel was a 52 years old woman living in Setúbal. She had been living there for most of her life, although born elsewhere, in Madeira. As a young adult, she experienced life abroad working in Switzerland, Spain and the UK as a bartender. Before going abroad, she completed the 9<sup>th</sup> grade, after missing a couple of years, and she considered she had not been a very committed student as a teenager. Her attention had started to focus on other interest such as singing and theatre, participating in local amateur ensembles. However, she would return to school some years after her definitive comeback to her hometown, at the age of 27. She finished her secondary education and successfully applied to university, completing the first year of

Social Service studies. At the same time, and for the past ten years, she had been working as administrative staff at the local hospital. At the time of our conversation, she had again interrupted her university degree due to work related responsibilities and lack of time.

During our interview, Isabel shared her memories of a happy childhood with her working-class family, which, in her opinion, was somewhat different from her peers' families:

I remember being outside playing with my sister, I was 10 and she was 7, and my mother would come to the back window of our 3<sup>rd</sup> floor flat and she would scream: - 'The opera is about to start!' [on TV] and we would race upstairs to watch it. I believe there is already something here, isn't it? We were already watching [opera] and we would love it! And I still go to the opera today when I can. I love S. Carlos [Opera Theatre in Lisbon]. [MTMG IP]

She also remembers the way the nine brothers and sisters would sit in the evenings with their parents to watch television. Again, the programmes they would prefer were of a cultural content as they would favour theatre and cinema broadcasts:

I don't know if I was the one who started searching for things on my own, if I was the one who looked for them... I mean my parents, though very humble people who had 10 children (you can imagine the chaos [laughter]) ... my mother's work was to take care of the children and my father was the 'man of the house', but they instilled in us something, they had something about them... and I think it all started when they bought our first television set. Well, the money wouldn't be enough for anything else, because we were so many, but I remember we had a very interesting routine that even today... I feel [pause... emotional laughter] ... if I get too emotional ... [pause] nonsense... Well with a very nice routine: when I was ten my parents bought our first TV. Maybe it was because of my sister's death at 17 ... we were all a bit at lost and the TV distracted us from our loss. But we had something, and that is the

point I am trying to make, unlike some young people today, we loved being with our parents. And what would we do together? *We would watch afternoon cinema during the weekends, cinema nights, theatre nights*, there were always theatre nights on Monday. That's gone from TV. There was some really interesting stuff back then. [MTMG IP]  
[author's emphasis]

It can be argued that in this emotional account of her childhood memories, Isabel is looking to identify the trigger for her keenness for culture related activities and how it shaped her sense of selfhood as a culture loving person. It is clear that, at least at an emotional level, there is a convincing connection between her family life as a child and teenager and the cultural preferences she continued to foster throughout her life. She also remembers visiting museums with her family, on special occasions because of the entrance costs, and the vivid impressions those first visits played on her senses. She refers to the smells and the impressive scale of the rooms.

Isabel's sustained engagement with our case study museum, MTMG, had started approximately ten years ago, when a friend working at the museum invited her to a particular show that resulted from an-ongoing partnership between the museum and a local organization working with disabled people (APPCDM). This show made a striking impact on her, because of the visible happiness of the participants despite the difficult constraints they endured<sup>86</sup>. And it inaugurated a new routine in her life: visiting the museum as often as she could, trying not to miss out on any of the adult oriented activities and events. When questioned about the possible reasons behind her repeated visits to the MTMG, she replied:

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<sup>86</sup> This partnership between the MTGM and the APPCDM that has put forward several shows and exhibitions, over the years and which, during our interviews, are several time alluded to by the participants as cherished experiences.

Firstly, because *I like every cultural related activity* of a certain, quote unquote, standard. I think that it is really important to come to these places and to see what other people have ... actually have created for us. And because *I value culture*, I think *it fills our souls*. [...]

Coming here, learning new things, being able to take part really *help us to grow*, and it also helps serving as a counterweight to the other stuff in life that is duller. Sometimes it is as *if life becomes lighter*, as if somethings that we generally pay attention to are now being put into perspective and we began to realise they are not that important because *this* [her connection with the museum] *is what is truly relevant*, this has *weight* [...] It has weight maybe because I am a true enthusiast, if I could, I would spend my life not working but visiting places, seeing things [...] I would like to be *a cultural agent* [sic] [laughter] trotting the globe. If I was to win the jackpot, besides helping the family and all that stuff everyone says, I would spend my time visiting all the cinema festivals out there. Theatre too, and dance.

[MTMG IP] [author's emphasis]

It is this thesis understanding that Isabel is talking about the personal change her sustained engagement with the MTMG allows for. She is referring to self-growth, be it because of the wellbeing that constant connection elicits on her 'filling her soul', making difficult aspects of her life 'lighter', in the sense of her life becoming brighter and less focused on the negative experiences she may be enduring; be it because by being close to the museum, taking part on its cultural events, she is doing the identity work on the facets of *herself* she most esteems. Someone who is not simply defined by the job she has, or by her educational achievements, but by her cultural consumption choices and practices. She is using the museum as a partner for her lifelong identity work as a cultured being. According to her that is 'what is truly relevant' and that is the reason she values her engagement with the museum: 'it has weight'.

Isabel and Artur are both working on their identities through their sustained engagement with their local museum. However, Artur is using his engagement with NMA as a trigger and support of his cultural creations and he could be framed as a ‘creator’. As for Isabel, she is using her connection with MTMG as a gateway to accessible consumption of cultural goods, and she may be best categorised as a ‘consumer’. Nevertheless, they are both (re)composing and (re)framing their identities in close connection with one paramount value: culture.

Another similarity between Artur and Isabel can be found on how they both express the chief importance of a facilitated access to these cultural institutions. Being local museums, geographically close to their homes, with null or reduced entry fees, and especially attentive of their communities makes them feel that they can claim some ownership, some sort of belonging. The same idea had already been expressed by Ermelinda when she declared feeling ‘part of the [museum’s] family’. Isabel phrases it like this:

[...] it [MTMG] *belongs* a bit to me [laughter]! I come here as if I am coming maybe to *my own house*. And when I go to other museums, maybe because they are not in my home town, I don’t partake as much... for several reasons, as one can expect. I feel more like a tourist. And here I don’t because I truly get to know its people, and I come here a lot, and I enter that door and I am at ease, *I feel part of it*. [MTMG IP] [author’s emphasis]

### **Maria**

At the time of our conversation, Maria was a 55-year-old woman, living in Setúbal for almost 50 years. She was born in Angola, one of Portugal’s African colonies at that date. Unlike the majority of this thesis interviewees, Maria does not come from a working-class family. On the contrary, her parents were upper middle class intellectuals and

art lovers; and her mother was an accomplished painter herself. She remembers visiting art galleries with her family at a very young age, and she could not say what was her first museum experience as it occurred so early in her life. Regarding her educational path, it started with painting classes, which her mother insisted she must have at the age of two, and it concluded in 2002 with a master degree in Cultural Studies, writing a dissertation about Art in Nineteenth Century England. Previously, when she was in her early twenties she had studied German Philology at *Universidade de Lisboa*. She took pride on having been an exceptional student, and she has worked as a high school English teacher for most of her career. In her free time, Maria also paints and explores sculpture as an amateur artist.

During our conversation she refers to museum objects as shortcuts to historical and cultural entities and pathways that she likes to tread:

Museum collections are shortcuts. Shortcuts that are available to us. And it is a waste not to use them. Even if it is just to enlighten ourselves. I think that is a wonderful thing: *to be able to enlighten ourselves*. We leave [the museum] *richer*. And not only in terms of our appreciation of art and culture, but in *terms of our lives*. [...]

And they are shortcuts because, for instance, a work of art is the representation of a thought, of an idea that is shared by many. A work of art is not born by itself. It's a conversation, a chronological dialogue, but also diachronical and synchronical dialogues. And those dialogues occur in a moment in time and space. It's a shortcut to me and to everyone else to find the sensibility of the person behind that work of art to her time and to all the other people who have been visiting it, have been marked by it, have written about it. I think a work of art is not just an historical document, it's a cultural document and a document about our sensibilities. And we need to *educate our sensibilities*. [...] And it is a shortcut because it is close to us, it is accessible. [MTMG MS] [author's emphasis]

Maria's engagement with museums can be seen as a natural continuation of the cultural practices she enjoys exploring ['painting, sculpting and reading'] and that frame her idea of self. She turns to museums looking for *enlightenment*, to proceed with the ongoing task of deepening her understanding of the world by cultivating her cultural awareness. To educate her sensibility. And here, again, we can identify an intersection between these two categories (Learners and Cultured). However, it is our understanding that Maria, unlike many of our Learner's cohort, is not searching to validate herself as a competent learner (she has done that through the official educational channels), in fact, she is engaged in deepening her cultural tool set.

Maria started visiting the MTMG from its onset, more than 25 years ago. She came with friends and found friends working at the museum. She continued to visit regularly, many times on her own, and since then, she has established a deep engagement that even extended into her professional life. For she has been taking her students to visit the museum's exhibitions for the past decade. She has developed with her students, and in partnership with the museum, several projects. Some of which were presented in at the museums' *Intercultural Afternoons* programme. She particularly remembers her favourite project:

I had this amazing experience with a Tourism class [10<sup>th</sup> graders], most of them are at the university now. We did a survey [...] about the experience of being a fisherman in Tróia [nearby peninsula with a particular fishing community]. We did interviews, films, we studied the names of their boats, we've heard and collected their life histories. And in the we made a wonderful *Intercultural Afternoon*, and I got to know incredible people. [MTMG MS]

During our interview, it became clear that the cultural tools Maria is looking to develop, through her engagement with MTMG, do not pertain exclusively, and perhaps not primarily, to her ability to decode and



relate to what has been coined as *High Culture*. On the contrary, some of Maria's most impressive experiences are of what can be regarded as working class 'culture', thus of an intercultural nature:

I have absolutely incredible photographs [of Nossa Senhora do Rosário's festivities] for another project. I've sailed with the *fisherman*. They offered me beer. [laughter] Those experiences... for a woman of *my social status*, because in the end we are still incarcerated in those divisions ... those experiences would not be open to me. I would not have access to those experiences without the museum. [MTMG MS] [author's emphasis]

Maria's partnerships with MTMG gave her particular pleasure and have contributed to an increased self-awareness and personal growth: 'It has helped me to grow, and that's paramount, because if I grow, my students also grow, my children, my neighbours'. [MTMG MS] Her enthusiasm regarding the work she has developed makes her confide she would consider a career change:

You could ask me if *I would like to work in a museum. I would love to!* In this one or in another one. ... Because I always have so many ideas for museums and to be inside putting them in place is one thing, and another is to be at a distance helping to develop a few ideas. I think that when we are inside something we get to know it better and to truly realise its potential. [...] I would love to organise international visits, networks... [MTMG MS] [author's emphasis]

This deep interest in every museum's core business, the one of collecting, conserving, researching, communicating and exhibiting the tangible and intangible aspects of human heritage, that Maria noticeably displays, can also be found in the third cohort this thesis came to identify: The 'Amateur Collectors'.

### 5.2.3. Amateur Collectors

In the visual schemata that sums the key argument of this thesis, presented in the beginning of this Chapter, we have suggested that the Amateur Collectors cohort that we have identified considers the museums like-minded institutions, engaged in a similar *passion*: the adoration of objects. They too collect, restore and research particular *things* and they are often drawn to museums looking for specific information regarding their objects of choice. Concurrently, they also visit museums interested in the museological processes behind the displaying of objects.

However, some of the participants that we have decided to label under this category are not particularly interested in the tangible, material realm of objects. Instead, they are mostly concerned with the intangible, with their immaterial heritage. Be it in the local history of their communities, be it with a more particular scope, their family's history. They are collecting the intangible and the museum is both a tool and a partner for their endeavours. Concurrently, it is also arguable that there are strong interconnections and intersections between what one may consider intangible heritage and its expressions in the material cultural. The intangible finds ways to consubstantiate itself into the tangible, and museums are so many times their guardians.

Over this section, we will present examples of both, starting with a collector of material things.

#### **José**

At the time of our interview, José was a 59-year-old man from Setúbal. As many of our participants, he had been born elsewhere and had moved there with his family when he was nine. He had had a straightforward educational path that ended with a degree in

Economics. He was now recently retired after a career in management working in several multinational companies for over 35 years.

From the onset of our conversation, José presented himself as a collector, more particularly a philatelist. His keen interests in postal stamps had started when he was a young child upon receiving a small collection that had belong to his father. When he was a High School student this interest was already becoming a significant aspect of his life and it even helped him cope with the stress during exams' time:

I remember when we had tests and exams and I had to study and I would be more nervous ... at the time we would say nervous we didn't know the word *stress* yet [laughter] and I would set all my stamps on the table of my bedroom and I would order them, arranging them and that worked as some form of therapy ... [MTMG JC]

After a ten years' interlude that coincided with his marriage and the initial and time-consuming activities of raising small children, he returned to his hobby with renewed enthusiasm. He stopped collecting every stamp that crossed his way and started specialising in a particular group of stamps: nineteenth<sup>th</sup> Century and early twentieth<sup>th</sup> century fiscal stamps.

José has been visiting museums all his life. First with his parents, an upper middle class family who enjoyed cultural activities and took him to see the Louvre when he was a teenager. And later, as an adult whenever he could find the time, visiting with his own family, or by himself:

*I enjoy old things, old papers [...] it is something that always attracted me. And the museum has that old paper's smell. Or it used to have... in my childhood museums had a certain institutional weight ... the old woods, the thresholds, the heavy curtains ... and that to me was*

always... I mean to a child that was interested in those sort of things ...  
*it leaves a mark.* [MTMG JC] [author's emphasis]

José's first museum encounters left an indelible impression that only added to his already emerging preferences and personality. José also describes himself as someone who has always enjoyed reading and writing and who during his adolescence also occupied his free time writing a small magazine for his family and friends:

It's a family thing... my father also had a newspaper and before him my grandfather. My grandfather wrote for a bigger newspaper and also did my uncle... so I guess there are few things that come with the genes. Philately was one aspect and also *this interest in culture*, but not in an overwhelming way. After my responsibilities with my family my *main interest and hobby is philately.* [MTMG JC] [author's emphasis]

Once again, we are confronted with the juxtapositions occurring in our taxonomic effort. José also sees himself, and (re)constructs his idea of self in terms of his appreciation for culture. But he has found a particular niche for this general appreciation for culture to manifest: the practices of collecting. And what are collections if not tangible manifestations of culture?

Living in Setúbal for most of his life, José remembers the inauguration of the MTMG, circa 28 years ago. However, his deeper engagement with the museum is more recent and happened mainly after his latest retirement. And he explains it in these terms:

The motivation [behind his visits to the MTMG] is certainly my fondness for this kind of history. *Because the museum does what I like to do, which is to preserve, to keep a glimpse of the past.* The stamps give me a special pleasure: having them, getting them, organising them. *And after it has been organised and catalogued it's a sort of museum, isn't it? It can be shown; it can be passed on as a legacy...* unfortunately my kids

do not appreciate philately but someone will [laughter]... [MTMG JC]  
[author's emphasis]

It is apparent from José's words that the allure of museums for him is deeply connected with a paramount aspect of his identity. After being a husband, a father, a retired manager he is a Collector. As someone who has been dedicating considerable time and energy, from a very young age, to the pursuit of particular objects. Discovering them, acquiring them, studying them, organising them and being their custodian. Not surprisingly, amateur collectors can see themselves as pursuing museum-aligned activities and sharing similar values: the preservation and study of material cultural. The museum *does what he likes to do*.

In the beginning of this section, we explained that this thesis Collectors' category is used in reference not only to traditional collectors of material things, but also in relation to a different sort of gatherers. Those invested in the recording, preservation and communication of intangible things. We will now look at some examples.

### **Arnaldo**

At the time of our interview, Arnaldo was a 64 year old man from Alverca. He had been born at this Lisbon's periphery town into an upper middle class family with historical links to the region. He completed his secondary education and started an Economy degree, which he did not finish. Like Artur, he also worked at the town's major employer, the aeronautical facility, known as the OGMA. He worked there for circa 30 years at an administrative level and had to settle with early retirement when the plant underwent severe restructuring in the late nineties.

Arnaldo remembers visiting museums in his childhood and was particularly drawn to heritage sites and historical palaces. He observes

he was impressed by its scale and multiple treasures. As an adult, he continued to visit museums both in Portugal and abroad and he remembers how his parents were always very supportive of his interests.

His engagement with the NMA begins from its onset when the museum was inaugurated in 1990. He had always been interested in the community's local history and had been researching and writing about it since the 1980s:

I've always been interested in the history of our town. Particularly in its cultural aspects. And as soon as the museum open I came to have a 'sniff' at it [laughter] [embodied response with Arnaldo reproducing a sniffing sound] I'm a very curious person! [...] A few years back *I had started to research my family's history and the town's*. I would go to the National Library and to Torre do Tombo [National Archive] and I contributed to some publications about Alverca's history. My family is one of the most ancient families in Alverca. And I had the privilege to know some great-aunts that had been born in the eighteen hundred's and who shared their experiences with me and the stories they also had heard from their ancestors. So, I've always known many things about Alverca. [...] So, when the museum first open I started coming and started to engage with its director who realised I knew many things and who would ask for my contributions. *I also come when I want some information*, when I find things that I cannot quite understand and need their help. So, I come every week and now I am almost part of the furniture [laughter] [NMA AB] [author's emphasis]

Throughout the years, Arnaldo has had an unwavering engagement with his local museum, rarely missing any scheduled adult oriented activities (except for the arts and crafts ateliers). But what he seems to value the most is the opportunity to deepen his research about the town's history:

Recently I was taking photographs of an old farm in the outskirts of Alverca and I saw a type of coat of arms with the owner's initials and I remember that a staff member of the museum had done a study about Alverca's historical farms and *I immediately came to ask her what she could tell me about that farm, that family*. I like to know the history of my hometown. [NMA AB] [author's emphasis]

It is this thesis understanding that Arnaldo is a collector of the intangible and his sustained connection with his local museum is fuelled by that particular identity. In it the museum appears to be both a tool and a partner for that constant identity work, the one in which he reasserts himself as a self-taught, amateur, local historian. A collector of its town's now intangible past. Although his interest in Alverca's history started with a very particular focus, the one of his family genealogy, it soon became a more general interest about its hometown's past. Something that he values and wishes to preserve and that he finds menaced by the unstoppable economical and sociological transformations the town underwent since the beginning of the 60's.

### **Jorge<sup>87</sup>**

When our interview occurred, Jorge was a 72-year-old man from Arcena, a small village just a few kilometres from Alverca. Like so many of our participants he was born elsewhere, in his case in Porto, and he had come with his family to this region when he was eight<sup>88</sup>. Similarly, to many of this thesis interviewees, Jorge's formal educational path was interrupted when he was 12, having studied only the first six levels of primary education. At that age, he got his first job, working as a sales helper at a Lisbon's drugstore. He sold door to door and he still remembers the physical strain he had to endure. From those days, he

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<sup>87</sup> All but one of this thesis participants, opted to be identified with their given names. This participant was the only exception who opted for anonymization.

<sup>88</sup> During the second half of the XX<sup>th</sup> century, Portugal sees an increase in its industrial production giving way to population migrations, from north to south, from the interior of the country to the coastal cities, specially among the working class.

also recalls a definitive resolution to return to school when possible. However, the Portuguese educational legislation of that time (mid-fifties) only allowed students over 15 years old to attend night school. So, he waited. When he was 15, he returned to school and concluded the vocational commercial course, finishing his secondary education. Due to poor health as a teenager, he starts practicing gymnastics and enrolls in a local club where he begins running at a very proficient level, winning several national and international medals. He confides that 'he wanted to make up for lost time' and was very determined to be successful.

Jorge's first visit to a museum happened during his teen years. He could not recall which museum was, but he thinks he went alone, deeply self-motivated. He recognises that he always had an interest in objects and for collecting. Particularly toys. He would look for them in old warehouses, in other people's rubbish and then he would restore and display them. He remembers with a stirring sadness the loss of his first collection, when he was in Africa serving during the colonial war, and his mother decided to 'unclutter' his childhood room:

One of the first griefs I had in my life happened when I was in Guiné, in the army, when my mother tossed away my *collection*. She wrote me saying that 'now that I had a wife and was a grown man I probably did not like the toys anymore' ... *I was deeply sad*, deeply sad... my mother is dead now and, as people say peace to her soul, but I was deeply *sad because I had toys that today I can only find, and some I can't, in the Museu do Brinquedo* [Toys Museum] in Sintra. Some of them were made of tinsplate and I was the one who fixed them when the winding mechanism broke. I would go to the old watchmakers to buy the wind and I would assemble it. [NMA JC] [author's emphasis]

He also recollects that, since his teen years and inspired by that interest in these particular objects, he began to look for them in



museums and from there he broadened his interest to other museum objects:

Because of that interest I would easily visit many things connected to museums. From art museums, paintings, sculpture... I know nothing about painting so I just use my unschooled taste: I either like it or not.  
[NMA JC]

After returning from the war and having finished his secondary education, Jorge still considered applying to the University. However, the demands of his new profession (marketing assistant at the Portuguese Airline, TAP) and his new obligations as a parent weighted against that aspiration. Nevertheless, he began pursuing his intellectual interests outside the school frame. At that time, he discovered a keen interest for anthropology, ethnography and folklore. That interest would find its expression when he joined the folklore group of Arcena where he lives, after an invitation of its manager. That was when his first visit to NMA happened, more than 15 years ago. He wanted to document himself on some aspects of the region's folk culture:

*We felt the need, because of the folk group, to do research, to collect, to study, to do historical reconstitution, to go beyond the mere presentation [of our dances and music] I came to the museum, even before its renovation works when its collection was just ethnographical to see some objects so I could talk about them. Because for me, the work of a folk group should not resume itself to dancing, chanting and playing, but also to do other things as we now do. [NMA JC] [author's emphasis]*

Jorge has continued to regularly visit the NMA since. He comes motivated by its interest in ethnography but he is always looking to integrate new insights into the work he does with the folk group, of which he is now its leader. His connection with the museum has also

helped him to assemble a small ethnographical collection in Arcena run by the group, the *Núcleo Museológico da Casa do Povo de Arcena*.

In this thesis taxonomy we have classified Jorge as a collector. Again, this is just one aspect of the identity work he does when visiting the NMA. We believe that it is uncontentious that he is also a keen learner, but he has found a particular niche for his inquisitive mind, leading him to collect information about the Portuguese ethnography, and particularly about his village ethnographical past. His identification with some of the museum's core functions (collect, research, communicate) has inspired him to lead a change in his own folk group, and to even replicate it, at an amateur scale, with the assembly of a permanent exhibition.

### 5.3. Final note

Over this Chapter, we have presented this thesis major findings, and its key argument, by providing a taxonomy for the identity work we believe the participants engage in. We have proposed that participants' identity work is mainly clustered into three major categories, coined as: '*Learners*'; '*Cultivated*'; and '*Amateur Collectors*'. As mentioned in this thesis literature review Chapter, *identity work* is a term first used in the museum literature by Rounds wanting to convey 'the process through which we construct, maintain, and adapt our sense of personal identity, and persuade other people to believe in that identity.' (Rounds 2006: 133).

Identity is a complex and multidimensional issue, that can be perceived both internally, as the way we see ourselves; and externally, as the way others see us. Identity can either describe more stable aspects of our personality, such as gender, ethnicity, nationality, religion, etc.; and also refer to the more circumstantial aspects of the roles we assume in different situations of our lives: for instance, when we are school students, or when we became parents, or assume new responsibilities at our professional lives. However, identity can also be defined as a very intimate process of self-construction in which, by a process of selection, individuals curate the self they aspire to. It is in this last definition of identity that our findings can be best understood. The identity categories that this thesis proposes are the ones that can best describe the identities our participants have been constructing, and aspiring to, throughout their lives.

Unlike Falk categories, they do not describe the shifting entry-identities all visitors assume at any given visit (Explorers, Facilitators, Experience Seekers, Professional/Hobbyists, Rechargers, Cultural Affinity and

Respectful Pilgrims<sup>89</sup> (Falk 2009: 64), although they share similarities with them, but refer to a more stable and ongoing process of identity work, the one of acting towards their aspired self. It is this thesis understanding that through their repeated visits to the two examined museums, these participants actualise aspects of their identity that contribute to the consolidation of their self-vision. Thus, the Learner prefers museum experiences that validate their mind-sets about what learning should be; the Cultured values experiences that expand their cultural *syllabus*; and the Amateur Collector favours the opportunities to enhance their specific knowledge and expertise.

So, thinking of our initial research question we can add: firstly, regarding the nature of the experiences and engagements adults obtain as a result of their sustained relationship with a particular community museum, we may say that the data have led us to suggest that those experiences are essentially of identity building. The engagement that these individuals have sustainably maintained with their local museum is inscribed in their on-going identity work, as suggested by Rounds (2006). Secondly, these experiences are relevant to their lives exactly because they provide the material to reinforce the identities individuals have chosen to foster. For instance, when an amateur 'collector' can assess specialised information in the museum about her/his area of expertise, or interact with the professionals in the field it reinforces her/his self-image as someone who is knowledge in the field, thus reinforcing her/his identity. Finally, in regard to our final research question concerning the way the participant's museum experiences are narrated within their larger biographical recounts, we believe that the process undertaken of data gathering through Narrative Interviews resulted in rich, multi-layered contextual frameworks that have underpinned many of this thesis interpretations.

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<sup>89</sup> The last two categories were not yet included in Falk *Identity and the Museum Visitor Experience*, but are later additions to his model presented in a 2011 Conference in Lisbon: Conferência 3e: Culturgest (Dec. 2011)

Throughout this Chapter we have presented what we consider to be this thesis key findings, providing the taxonomy we have developed to interpret the core of our research data. We have presented in detail the three identity categories developed (the Learners, the Cultured and the Amateur Collectors) and have given several examples from the data to illustrate those distinct, but at times, overlapping categories. However, as stated in the beginning of this Chapter, namely on the 'Key findings diagram', a fourth cohort was also recognised, labelled as '*Social Networkers*'. This group exhibits a set of differentiating characteristics, starting with a less evident level of engagement with the museum setting. Over the next Chapter, we will explore this additional group, and look at other ancillary aspects of adult museum engagement this thesis has identified.

## **Chapter Six: Ancillary Aspects of Adult Engagement**

### **6.0. Preamble**

This Chapter examines ancillary aspects of adult engagement that were uncovered during the research for this thesis'. As stated in the previous Chapter, this thesis proposes that in our two case study museums adults engage in sustained relationships with local museums as a part of their ongoing identity construction process. Nevertheless, this thesis was also able to identify additional aspects for this engagement, specifically, the paramount need to be socially active and connected. In this thesis taxonomy, this cohort was classified as 'Social Networkers' and exhibits a set of differentiating characteristics, starting with a less noticeable level of engagement with a particular museum setting.

After examining this fourth group, this Chapter will subsequently explore the relevance of strong museum leaderships and the impact they seem to have on adult's engagement, based on this thesis participants' testimonies. Next, this Chapter examines deeper engagements between a limited group of participants and their museum of choice, looking at the additional data, which emerged from recorded participants led guided visits. Finally, this Chapter concludes addressing the particularities and dissonances across the two case study museums.

## 6.1. Adult Engagement

### 6.1.1. 'The Social Networkers'

As noted in the previous Chapter, this thesis characterisation of the different identities at play is open to juxtapositions. It has been argued that this research participants use their museum experiences, particularly their sustained engagement with a unique museum, as a strategy for self-development. Noticeably, as mentioned in the literature review Chapter, researchers define identity as a fluid entity, subject not only to structural features such as race, gender or class<sup>90</sup>, but also less fixed aspects such as the individual's life choices and events (Falk 2009, Rounds 2006). Experts have shown us that throughout our lives we manage different identities and that this fact is a constitutional aspect of our sense of self.

Concurrently, the interpretation of this research data revealed, not only, juxtapositions between the identity categories proposed (Learners, Cultured, Amateur Collectors), but also the existence of a fourth cohort whose engagement with the museum is first and foremost a response to the need for social connectedness. This group was labelled as the 'Social Networkers' and it appears in the data studied from both museums. However, in addition, the data also suggests that this specific group has a less developed sense of engagement with their local museum. And that the museum appears chiefly as an enabler for social encounters, which are simultaneously inclusive, affordable and occur in a safe space. This thesis argues that this individuals' primary motivation for participating in the museum's activities is driven by their necessity to be socially active and engaged, particularly at a stage of their lives marked by the challenges of retirement, widowing and less pressing family obligations.

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<sup>90</sup> And even for these aspects it can be argued a degree of fluidity.

It is also interesting to note that all the participants classified in this group are female, in clear contrast with the *Collectors* cohort, composed only of males. This fact may be a coincidence or may be linked, for instance, with some of the museums' activities such as the arts and crafts ateliers proposed by one of the museums (NMA). However, this is a subject that lies outside the boundaries of this thesis and would benefit from further investigation.

Over the next section, we will consider some exemplary cases of the 'Social Networkers' group.

### **Augusta**

As mentioned in the previous Chapter, Augusta is a divorced, retired woman from Setúbal, living alone. At the time of our interview, she had been participating in the MTMG guided-visits' program<sup>91</sup> for the last four years. This programme mainly targeted older adults and put forward a series of guided visits not only to the city's cultural and heritage sites but also to museums and sites outside, in Lisbon, for example. When asked about her motivations to participate, Augusta was very straightforward:

*I love, love the conviviality! [If I come alone,] I will always find someone I know, or get to know someone new. Friendships are made. And I just love the conviviality. [...] I am retired, and I even stopped doing my crafts, my knitting [...] I had a busy life taking care of my family and now I clean my house and that's all. So, even if it's only every two months, I am always anxious for the next visit. We all are. This is our happiness! [MTMG ACP] [author's emphasis]*

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<sup>91</sup> This programme was a joint effort from the council's Culture and Sports Department and the MTMG. Many of the visits were guided by the museum's director himself.



Concurrently, when questioned if and how her life had changed since she began participating in these visits, she responded:

[If I did not participate] I would have been more *isolated and unhappier*. A person begins to become more inactive. I can't do my knitting; I have trouble reading. [...]. I worked all my life and made contributions for 34 years [to the Social Security Scheme], and my pension is 274 Euros. For everything: my house, water, electricity, gas, medication, to buy food and I have to make it work, but it is very little. And then these visits started and it *felt quite good*, to me it was a *joy*. [MTMG ACP]  
[author's emphasis]

For Augusta, participating in this activity allows her to maintain a broader social network and to feel engaged, thus enhancing feelings of wellbeing and happiness. She also values the inclusiveness and accessibility of this museum program, particularly given her economic situation. Nevertheless, apart from participating in this specific activity, and despite having visited the MTMG several times in the past, Augusta did not engage in the museum's other activities. So, although she revealed herself to be very keen on this specific activity her connection to the museum was, at the time of our interview, arguably less intense in comparison to some of the other interviewees quoted in this thesis. This fact may point to consider that the MTMG could be replaced by another institution, providing similar services, without compromising Augusta's experience of social connectedness and interaction.

A comparable argument can be made for the next participant:

### **Maria João**

At the time of the interview, Maria João was a 69-year-old widow from Beja, Alentejo, living in Setúbal for 50 years. She stopped her formal education at the age of 9, with just two years of formal education. As the oldest daughter in the family, she had to take care of her siblings

while her parents laboured in rural estates. Later, she worked all her life as domestic staff. She had been retired for four years and, before joining the MTMG's guided visits program, two years before, Maria João had never entered a museum, and she thought she would never enter in one:

After my retirement, I was very sad [...] I started to come [to the visits] two years ago, and now *I don't miss a visit* [...] because I like it a lot, I like to see the images, the pieces, and *I like to be with other people*. We talk, they explain me the things I had never seen. All the beautiful things I had never seen [...] *My main motivation* is because I like it a lot, because of the *conviviality*, because I get to go out [of the house], there is a lot of *freedom* [sic] in seeing new things, to *know new people* and things. [MTMG MJO] [author's emphasis]

As Augusta, Maria João does not participate in other MTMG activities, and she does not have a sustained connection with the museum as a whole. However, she found in this specific activity a means to fight isolation and to remain socially active after an unwanted retirement. Likewise, Manuela, whose story was already mentioned in the previous Chapter, also reveals a similar connection with the MTMG activities.

### **Manuela**

In the preceding Chapter, Manuela was presented as a clear example of this thesis taxonomic juxtapositions: being classified simultaneously as a 'Learner' and as a 'Social Networker'. Having already addressed the issues pertaining to the Learners identity cluster, it is relevant to note the features that led to Manuela's classification as a 'Social Networker'. After her husband's retirement, Manuela started participating in the museum's guided visits activity as part of a group, when he was also free to participate. In addition, she stressed the pleasure to be connected with other people and the need to escape solitude as major triggers for her involvement:

I *always* come [to the visits] *with friends*, because it is so *much* *funnier*. It's more *exciting*! To go alone is less interesting, with company one talks about one thing and the other one talks about something else... *it is other experience*! [...] If I could not come I would be very sad. I would stay more time at home, *more isolated*, *I would not meet new people*, and *I would not develop more*! [MTMG MF] [author's emphasis]

Like the other participants classified as Social Networkers who have been engaged with the MTMG guided-visits' activity, Manuela does not exhibit a profound engagement with the MTMG *per se*. At the time of our conversation, she had been for several years extremely committed to this specific activity but did not visit the museum otherwise.

At this point, it is relevant to note that, at the MTMG, the interviewees classified as Social Networkers were all involved in the museum's guided-visits programme and did not consistently take part in the museum's remaining activities. Because this programme was a collaboration between the city council and the museum, many of its participants knew of its existence through the city council and not via the museum, thus, strengthening the argument of a lesser degree of engagement.

Similarly, in the other case study museum, the NMA, the participants classified as Social Networkers had all been engaged in several arts and crafts ateliers and usually did not participate in other initiatives promoted by the museum.

### **Arminda**

At the time of the interview, Arminda was a 65-year-old retired woman living in Alverca. Like so many other participants in this study, she also told a story of childhood poverty and premature school abandonment.

During her active adult years, she worked as a seamstress and had a flower stand. She had recently become a widower and, to cope with the loneliness, she began participating in the NMA's arts and crafts ateliers:

I started a year ago. I have been participating in the crafts classes. [...] My motivation was not to learn new skills [they were not new to me] *I came to be distracted, to be with other people*, because I became a widow a year ago and *I needed to get out of the house*. To mingle with other people. [...] *I like to communicate!* I brought two friends with me. We came together. [NMA AT] [author's emphasis]

Like Augusta, Arminda also stresses the importance of these activities' free access and inclusiveness for people who, like her, must manage a very exiguous pension:

There are people who have the means to go for visits, to go out and dance. And here we have many arranged excursions and all... But there are people like me, who don't have the means. I have a *very small pension* of 227 Euros. And this *allows me to participate* to get out of the house, to mingle with other people. [NMA AT] [author's emphasis]

Identical to the previous cases, Arminda seldom participates in the museum's other activities. And concurrently, Olímpia, this cohort's final example, exhibits analogous characteristics that have been described for the Social Networkers category:

### **Olímpia**

On the date of the interview, Olímpia was a 66-year-old woman. After her retirement from the public service, at the age of 65, she moved to Alverca from Lisboa. Her schooling, like so many others in this study, was prematurely interrupted having barely completed the 4<sup>th</sup> Class. Olímpia had never entered a museum before her first visit to the NMA a few months earlier. She had been participating in the museum's arts

and crafts ateliers since. She mentioned that the chief trigger for her participation was to escape idleness and ennui subsequently to her retirement:

*I was very sad to stop working. Now, I am starting to cope with it! I was just going to my gymnastic classes and nothing else. [...] So, I came here to ask and now I find it very funny! It's like returning to school, I don't have any ability to paint, but I like to be here, it's lovely, to be occupied, to meet people. [...] It's such a boredom to be at home [...] and we don't have to pay! [...] And there is so many of us, and we are connected to other people. [NMA OS] [author's emphasis]*

It is this thesis proposition that Olímpia, like the other participants classified as Social Networkers, reveals a feebler engagement with the case-study museum. Nevertheless, these museums have been providing valuable opportunities for social connectedness, improving these individuals' wellbeing and quality of life. The fact that they foster proximity relationships with their communities, makes them more inclusive and unthreatening, particularly for those who have not experienced museums before and for those with severe economic constraints.

#### 6.1.2. Leadership and Engagement

Grounded in the data collected, this thesis additionally proposes a possible correlation between the leadership in these local museum, simultaneously accessible and strong, and their capacity to ignite the engagement of their communities, specifically the adult frequent-visitors studied in this research. The participants' testimonies suggest that their engagement with the museum, despite their distinct motivations, benefits from a direct relationship with its senior staff, particularly with the museum directors themselves. Testimonies from both case study museums strongly point towards this link concerning

attentive leaderships and the quality of the participant's museum experience. These individuals value the direct involvement of the senior staff in the museum's activities; the director's capacity to communicate their expert knowledge in an accessible and reassuring mode; the fostering of personal interactions; and, finally, the recognition of their individual contribution to the museum's work.

In this thesis participants have stressed the significance of the museums' senior staff direct participation in many activities, especially of its directors. Running guided-visits, presenting thematic sessions, facilitating creative workshops, etc. and thus adding value to their experience. Manuela, previously quoted in this thesis, notes how the direct involvement of the director of the MTMG, José Luís Catalão, in the guided-visits programme improves her learning experience:

We are guided by a *brilliant mind*! [...] It is so different from when I go on my own. *I get to know so much more* at these visits! [MTMG MF]  
[author's emphasis]

Augusta, also formerly cited, expressed similar opinion focusing on how her learning is enhanced by the MTMG director's communicative skills:

When Mr. Luís [MTMG's Director] goes, he explains everything! And *we get to know everything*! [MTMG ACP] [author's emphasis]

Another participant, Maria José, corroborates their view:

The director of this museum [MTMG] is a fantastic individual! His guided-visits are fantastic! I get very impressed *by the way he interacts with the visitors*! [MTMG MJS] [author's emphasis]

These testimonies from the MTMG regarding the value they attribute to being able to directly interact with the museum's leading staff are echoed in the statements voiced by the participants from the NMA.

Some interviewees from this museum assert that part of their engagement derives from the personal relationship they have been establishing with the museum's director over the years.

When interviewed, Helena was a 59-year-old woman from Alverca whose first museum experience had occurred two years previously at the NMA. She, like so many other participants in this study, interrupted her formal education after only four years of schooling. At the time of the interview, Helena was already retired from her lifelong employment at a telephone company. When asked what were her first impressions of the NMA, Helena highlights the welcome she received from the museum's director:

*I immediately liked Dr. Anabela [the NMA director]. I have to say that I find her an extraordinary person, very active and involved. Someone that feels at ease with us and that likes to mingle with the visitors.*  
[NMA MHP] [author's emphasis]

Helena started her engagement with the NMA by enrolling in its arts and crafts ateliers, however, because of the nurturing environment she found, specifically the museum's director's enthusiasm and encouragement, she decided to venture in the museum's creative writing workshops:

I don't know how these stories come to my mind. I [wrote] one about a lighthouse. And I described the lighthouse, the sea, the house, my story was based on that. And I pictured it during the WWII, I don't know why. I just did. [...] *The things a person is capable and doesn't know, we have to discover them. And it felt good to do it.* [NMA MHP] [author's emphasis]

At the NMA, participants also valued the straight connection they were able to develop with the museum's director, who, from their testimonies, is always available to interact with them. One of the

participants, already quoted in this thesis, Arnaldo, reveals that visiting the museum has become part of his daily routine. He can go several times a week just to greet the museum's team, and to have a brief conversation with the director:

I come every week. Sometimes, several times a week. Even if I don't have anything I'm working on, *I just come to say hello and to talk with Dr. Anabela* [museum's director] [NMA AB] [author's emphasis]

A similar attitude is described by another of NMA's frequent visitors. Artur, who has been quoted in the previous Chapter and who will be quoted again later in this Chapter, believes that the museum has become a considerable part of his life and that that it is linked to the quality of the human interaction he has found there:

I think it is clear *the museum is part of me* [...] Even if I don't come every day, I try to come regularly even if it is just *to greet the staff, the people that I esteem a lot*, and that have become, maybe because of my personality, *almost part of my family*, so I guess I can say that the museum is in a way a home, it's part of my life. [...] *And I am grateful* to Dr. Anabela for all her ideas and encouragement. [NMA AF] [author's emphasis]

But Arnaldo, another participant already featured in Chapter Five and who will be discussed later in this Chapter, also values the recognition of his individual contribution to the museum's work. For the past years, he has been contributing with his local historian expertise helping the museum to document and register Alverca's past:

*Dr. Anabela asks for my opinion and knowledge about Alverca.* Because my family has lived here for centuries, the memories and testimonies have passed from generation to generation. But I am, in particular, an enthusiast of my town's past. It's my identity, my story. I am always taking photographs of the remaining heritage buildings, old abandon



farms and then *I share them with the museum* [...] Or when I find old documents relating to my family's history, old photographs I come here to scan them and share them. [...] Because my family has always lived here, people in Alverca know me, especially older people, and I am able to sway them to come to the museum to share their photographs and to visit. *And the people from the museum are grateful for that.* [NMA AB]  
[author's emphasis]

Concurrently, several participants from both case studies have stressed the importance for them to be able to donate their objects and artefacts to the museum, this fact contributing to their sense of self-worth and to the valorisation of their common heritage and identity. In both museums, there have been calls for the community's direct participation in temporary exhibitions through the donation of objects, sharing of historic photographic records, or the collection of oral history testimonies. In these occasions, interacting directly with the museum's senior staff has been pointed as very rewarding and reassuring. In other occasions, the desire to donate is self-motivated and, although these individuals are aware that their objects may never be exhibit, they still find value in the musealisation of their past. It could be argued that the value of the museum lies, in part at least, through revaluing local cultural heritage of the people who made and use the museum collections. This notion presents a welcome alternative to the contemporary monetarist society where the cost of everything is prioritised. The museums widens our notion of what is and should be valued.

Based on such testimonies, it is this thesis' suggestion that at these two local museums the proximity that has been fostered between the museum's staff, noticeably its senior staff and directors, and its communities, particularly its frequent visitors is a key factor of engagement for these individuals. The data suggests that the level of attention senior staff exhibits towards them acts as a boost for the

participants' self-esteem and willingness to continue to participate in the museums' activities. The sharing of their expertise in an accessible and inclusive mode, the direct participation and interaction with the visitors regardless of their 'museum literacy', the personal connections they foster, and, finally, the recognition of their individual contribution to the museum's work, as donors, as repositories of a collective memory, which the museum is keen to register and preserve, are aspects that have been identified as relevant when exploring these adults engagement with their local museum.

### 6.1.3. Unpicking deeper Engagement – Participant-led ‘guided-tours’ as a method to further explore adults’ museum engagement

As already described in this thesis methodology Chapter, after the interviews in both case study museums were finalised, three individuals were additionally asked to participate in a second interview. These three individuals were selected based on their deep engagement with their local museum (frequent visits over an extended period of time). The framework for this second interview was inspired by Everett and Barrett’s work (2012), which used participant led ‘guided-tours’ as a methodological tool ‘to probe individual relationships with a museum [...] provid[ing] a context and purpose for rich conversations between the researcher and the participant’ (2012: 32).

Thus, this research being particularly interested in exploring the nature of the sustained relationships individuals maintain with a museum invited these three participants (two from NMA and one from MTMG) to a similar experiment. These participants were asked to escort the researcher in a visit to the museum, in a completely free and unscripted mode. There were no time limits for the interview and participants were free to select which rooms they wanted to visit, and to decide on the pace of that roam. Apart from providing a rich naturalistic setting (Lincoln & Guba 1995, Hein 1998) for this additional data gathering, this exercise, also allowed for a repositioning of the power balance between the interviewer and the interviewee, by giving the latter the control that usually is in the hands of the former.

Concurrently, this additional method for gathering data is also very attuned with Narrative Inquiry, one of this thesis theoretical frameworks. By providing an active *interaction* between the participants and the researcher, in a natural *situation*, and as a *continuity* of an ongoing research relationship, this exercise follows Connelly and

Clandinin's basic tenets for Narrative Inquiry: *sociality, place and temporality* (2006)<sup>92</sup>.

### **Arnaldo's guided-tour of the museum**

Arnaldo started his tour at the NMA's temporary exhibitions room. He purposefully wanted to start our visit showing a deeply personal object, his first toy, which he had lent to the museum for the exhibition 'Childhood Plays':

Here is my first toy. A rattle [an old-style silver rattle]. My godparents gave it to me when I was born. So, this is my first toy [laughs]. There are other objects here that my mother kept from my childhood. For instance, those wooden cubes. But the other toys are also familiar. I had similar toys growing up, look at those tin-toys, I had a complete collection of those. There used to be a fair in Alverca where we could buy these toys. They are from my childhood. [...] I would also do some tin-toys myself. For instance [pointing at a toy scales] I did a similar one when I was a child. But, here at the exhibition, I have another object that I did. That little wagon. I did it in my arts class, using wood and metal. I was inspired by the 'Sleeping Beauty' fairy-tale... No, I'm sorry that's not the correct one, it's the Cinderella [laughs]. [...] I also could find and bring to the museum and for this exhibition old photographs of children playing. Me and my brother playing with different toys. My cousins. I have a special feeling for a photograph from the late eighteen hundred with my great-great grandfather and his daughter, my great-grandmother, in which we can glimpse a toy on her hand. [NMA AB]

By starting his 'guided-tour' looking at these personal and emotionally layered objects, Arnaldo was asserting his intense relationship with the museum in a two-fold mode: first, these are objects that belong to him,

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<sup>92</sup> Additionally, according to Everett & Barrett this Narrative Inquiry attributes (sociality, place and temporality) are also align with Dewey's definition of experience (2012: 33).

or resonated with his past, and can be interpreted as identity relational objects, and secondly, he shows his trust in the museum to display and care for such intimate artefacts and material testimonies of his past.

The visit moved on to the museum atrium where Arnaldo was keen to share his knowledge and ideas about his village past. He made a stop there and he talked at length about the origin of the building that holds the museum today. It was a former municipal building, probably medieval, that was destroyed by the 1755 earthquake, and many times rebuilt since. Arnaldo shared his expertise in the village heritage, explaining the different periods of the building. He noted: 'A museum is also its building! I think this is relevant!' [NMA AB] Having accompanied the archaeological studies that were done during the building's last renovation works, Arnaldo declared that he was surprised that the excavations: 'did not find evidence of an Arabic occupation, just Roman. It is puzzling because the origin of the word Alverca is Arabic!' [NMA AB]

We continued our visit to a room exhibiting an ethnographic collection of the village's rural past:

This room is very well designed, because it portrays all the activities, and the life that, not very long ago, one could have found in this region. Before the industry invaded this zone.

[...] The river [Tejo] used to flood these lands, and because here the river is already salty, because of the estuary, the grass would accumulate salt. Then the shepherds would bring their flocks to these lands and their milk would become salty, giving the Alverca's cheese its famous taste.

[NMA AB]

Arnaldo ended his almost an hour-long tour taking us to the Documentation Centre of the NMA. Again, he used this opportunity to further expose his specialist knowledge regarding Alverca's heritage

and, consequentially, confirming this thesis interpretation of the identity work he is invested in doing in the museum. The one of a collector, and one of a specialist:

Every new discovery I make, every new document or object that I find I bring it here to the documentation centre. Because I want it to be preserved, either for me, or for other people who want to study these themes. There are some documents that you can only find here. And that's important. [NMA AB]

### **Artur's guided-tour of the museum**

Artur also started his tour at the ground-floor of the museum building. We entered the temporary exhibition room, which displayed the community-driven exhibition 'Childhood Plays' already alluded to. Artur stressed how this exhibition was crucial to the preservation of this community's memory:

I think that it is very important that this exhibition was put forward, not only for the ones that will come after us can know our past, our creativity, our ingenuity, our way of playing that was completely different from today's. [...] For me this exhibition is very well designed and executed and I think it gives to those who come to see it a very approximate picture of what playing used to look like in this part of the country. [NMA AF]

Looking and pointing at some tin-toys, he noted that he had felt inspired by the exhibition to write some poems about his childhood pastimes. He then began to read a poem about a tin-toy car he built using his grandfather's tools and materials, linking his childhood plays to his long-lost family member. During our conversation, it became evident how this exhibition could summarise Artur's enduring relationship with the museum: the museum provided him a permanent stream of inspiration for his creative endeavours, while, at the same

time, preserved the memories of his community, reaffirming the specific identity of being an 'Alverquense'.

The visit proceeded following Artur's lead towards the NMA Documentation Centre. Here he concluded his tour noting:

This is a very important space in the museum, for me! Most people don't come here, because it has no objects on display. But here is where I know I will carry on. The museum has been collecting my poems and they are here. My identity is here. I am here! And that is something! [NMA AF]

### **Isabel's guided-tour of the museum**

Isabel started our tour at the small atrium of the MTMG. There Isabel expressed her will to firstly present an introduction to the museum. She began sharing her knowledge about its origins and how the Giacometti collection was gathered, in the mid-seventies of the twentieth century, and later came to the museum. Her speech was very articulate and the information very precise and detailed. We can sense that she is taking pleasure in being given the opportunity to reveal what she knows about this museum.

Next, we followed Isabel's lead down the descending open room where the *Giacometti Ethnographic Collection* was on display. Pieces from a not so distant rural past, not only from the countryside around the town of Setúbal, but also from the rest of the country are exhibit thematically: work, home, family, religion, traditions. 'Do you reckon people from Setúbal today recognise these objects? Do you think they can find echoes of their past here?' I asked her:

'Yes! I think so! But even if they don't, I think that is always positive to have an understanding of the evolution of things. And it is also useful, I think people are revaluing and returning to their rural landscapes.'

Maybe we will have to return to agriculture! [laughs]' [...] *These are among my favourite objects at the museum. They are very moving!* [‘why?’, I ask] Because they belong to the work of the land, that is something that is alive, and although I have been urban all my life, I think that is a special occupation, I think it is a very meriting job! [...] This is pedestrian collection, but it’s a rich collection. It has the same value, culturally speaking, as the Fifteen Century art collection that we can find in *Museu de Setúbal*. *This collection reflects the cultural richness of a People and that moves me deeply.* [...] And bringing these rural, discarded objects to museums adds value to them. It helps the younger generations to feel proud of their past. [MTMG IP] [author’s emphasis]

Isabel’s reflections about the museum’s collection revealed her deep engagement with the museum’s objects and with the cultural landscape they encapsulate. And those reflections are extended as we moved downwards towards the ground floor of the museum, where the industrial archaeology collection was on display in a very ample central room. Tin cans of different sizes and with different decorations occupy some shelves, but what immediately catches Isabel’s attention are the original work stations with full-sized dioramas depicting the fish canning process:

I really like this space. It is the centre of the museum, and it serves also as a reunion venue where the museum develops many activities. And I always feel as if these women here [figurines in the dioramas executing several of the canning factory works] are alive and are also participating in the activities. [laughs] It is so well designed, that I get that feeling! [MTMG IP]

Moving through the dioramas, I asked her why it was important for her to come to the museums activities, the gatherings, the debates, the exhibition openings. She replied:



I am always excited to know that things are happening here. That there will be something that will bring me here. First, because of the way we are welcomed to the museum, and they make us feel included. It is as if I know I will be at a party at someone's house, and we have that expectation to see who's coming to perform, to talk, to present their work. What type of food they will be serving, gastronomy from which country. That's always there. [MTMG IP]

'And why is it important, for you to have a personal relationship with the people from this museum', I then questioned:

It is almost a bonus! [laughs] At my age I think I deserve it, I have been participating for a long time, and I have accumulated knowledge and I have been invested in the museum.

Coming here is very therapeutic! ['why', I asked] Because I feel that even when I'm seeing a mere exhibition, or something else, all the other things in my life became secondary, it is almost like meditating!

Because we delete from our brains all the noise, all the stuff that is not relevant. And I find that to be very invigorating, and it helps me to deal with the horrible stuff out there. [...] It's about mental sanity, really!

[laughs] [MTMG IP]

I continued to follow Isabel to the less visited areas of the museum, passing by the Documentation Centre, and next the Education Room. Isabel knows all the corners of this building, and knows most of the people working here. We then move upstairs and we enter Isabel's favourite room at the MTGM: a historical grocery store that had been translocated from a busy street in Lisboa to the museum a few years previously. Entering this room was a very immersive experience, as the store was rigorously reproduced inside the museum. We can find real groceries, as dry beans, canned fish, spirits, and other slow-perishable goods. Isabel divulged:

Entering here is like returning to my childhood. Although I never entered in this specific grocery store growing up, we had similar Nineteenth Century stores in Setúbal and I remember them vividly. And entering here I remember the smells ... [‘It is a very sensory experience’, I added] Yes, it is! All these smells, touching the cabinets, and the food [dipping her hand on the dry beans on display]. And grocery stores used to be a place where people could talk to each other. Where everyone would go. They used to be spaces of reunion, which were central to the community. I am very happy that the museum has found such a dignifying way to receive this heritage. [MTMG IP]

After more than one hour visiting all the museum’s rooms, we finished our conversation returning to the museum’s atrium. It was clear from our conversation that this museum was a very personal space for Isabel. The MTMG belonged to her personal itinerary and was one of the places in her life where she felt more comfortable in. As a final remark, she stressed:

I like to know things, I like to be involved. But I also like to share what I know. Otherwise it feels less relevant. I like to ‘contaminate’ people with my ideas. And so, I am always sharing what I experience here at the museum. [Do you feel like a champion for this museum? – I asked] Yes, That’s it! I feel like a champion, because I feel the need to share the things I love and know! [MTMG IP]

It can be argued that these excerpts from Arnaldo’s, Artur’s and Isabel’s tours to their museums of choice can provide an additional layer of interpretation of the sustained engagement experiences adults can have with one unique museum over a long period of time, which this thesis is aiming to discuss.

The additional methodological exercise of the participant-led ‘guided-tours’ provided a naturalistic setting, in which the interviewees felt empowered and frequently acted as ‘specialists’ in ‘their’ museums. The

familiarity they have with the space created a protected environment for them to express their feelings and thoughts, verbally, but also to materialise those ideas by leading the researcher to those objects, making them visible to the researcher's eyes. It can be argued, then, that because museums studied in this thesis are first and foremost places of things, which have a material presence, adopting similar research methods that address the individual's experience in the natural context of a museum visit can be beneficial to current visitor studies research, particularly, after the establishment of a sustained rapport between the interviewer and the interviewee. Everett and Barrett argue that the relational quality between the researcher and the research participants can add to the outcomes of Narrative Inquiry (Everett & Barrett 2012).

Furthermore, because these 'guided-tour' conversations were unscripted, and aimed to be 'informal and flexible' (Everett & Barrett 2012: 40) a different array of topics could emerge directing the conversation to unexpected sensory subjects, like the 'cheese conversation' with Arnaldo, or the 'grocery store' keenness revealed by Isabel. In all these cases, those topics were brought up to the conversation by the participants, again, rearranging the power balance in the research scenario. Doing this additional research exercise it was also relevant to observe how these participants were intensely drawn to objects that resonated with them at a personal level. For instance, when Arnaldo chose to start his tour by showing his first toy, or when Artur recited a poem he wrote inspired by a childhood toy on display, they both select objects that 'have direct connections to their lives' (Everett & Barrett 2012: 41).

Finally, and extremely relevant to this thesis key findings, the conversations elicited by these participant-led 'guided-tours' corroborated the interpretation about these individual's identity work presented in the previous Chapter. During his guided-tour to the NMA

Arnaldo clearly adopted the pose of *a* Collector, of someone whose specialist knowledge provided a mutually beneficial relationship with museum. As for Artur and Isabel, it can be also argued that during their guided-tours they reinforced the idea of being Cultured individuals looking for permanent self-actualisation and using the museum as a sustainable platform to do so.

## **6.2. Looking at the Differences – dissimilarities of the two case study museums**

As stated in the previous Chapters, we have decided to interpret and present the research data analysis thematically joining data from both case studies and concentrating on their similarities. However, an in-depth analysis of these two different cases would not be complete without an overview of the differences, or nuances between the two case study museums.

Firstly, there is an obvious size difference. The MTMG is a larger museum with more permanent staff (at the time of the research there were ten members of staff), whereas the NMA is a smaller branch of the municipality's bigger museum (Museu de Vila Franca de Xira), employing at the time of the research only four permanent staff. Although, both have permanent exhibition rooms, temporary exhibition rooms, conference room, educational services room, and documentation centre, they are substantially different in terms of square meters. The MTMG has approximately 230 m<sup>2</sup> of exhibition area contrasting with the approximately 80 m<sup>2</sup> of the NMA. Neither have a functioning cafeteria, but they are both prepared for disabled visitors.

Secondly, although both are local museum aiming to portray the identities of their communities, the MTMG's collection, because it has received the ethnographic assemblage gathered throughout the country in the 1960' and 1970' by the ethnographer Michel Giacometti, possesses and exhibits objects from different parts of Portugal. Conversely, the NMA only exhibits material evidence, archaeological or ethnographical, pertaining to the region and with special attention devoted to the small village of Alverca. This has found a visible translation into the activities programming of both museums and in the scope of their museological work. With the MTMG having a more sociological approach to its

collections and communities and the NMA privileging a more historical stance on the interpretation of their community's heritage.

### **Museu do Trabalho Michel Giacometti**

Occupying the building of a former Nineteenth<sup>th</sup> Century canning factory in the city of Setúbal, the MTMG has since its final opening, in 1995, aimed to serve both its local audiences, but also to assert itself as a relevant case in the national museology scenario as a good example of an industrial museum. Achieving its ambition, it had received international recognition when in 1998 it was awarded an *Honourable Mention* from the Council of Europe of the *European Prize for Museum of the Year*. A more cosmopolitan vibration can be found not only among its visitors, but also in the their museological programme. That may be due to the rapidly changing sociological fabric of the city of Setúbal, which during the 1970s and 1980s became the new home for the many Portuguese returning from the former colonies in Africa, and subsequently in the 1990s and early 2000s, was the final destination for the numerous immigrants that arrived in Portugal in those two decades. They came mostly from Brazil and Eastern Europe and formed their small communities in the city of Setúbal<sup>93</sup>.

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<sup>93</sup> Vide 'Diagnóstico Social da Rede Social de Setúbal – Demografia e População' available at <http://redesocial.mun-setubal.pt/page6/downloads-3/files/Demografia.pdf>



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**Figure 21 – Intercultural Afternoon: Brazil [2008]**





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**Figure 22 – Intercultural Afternoon: Ukraine [2008]**



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**Figure 23 – Intercultural Afternoon: ‘Cante Alentejano’ / ‘Alentejo Singing’ [2005]**





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**Figure 24 – Intercultural Afternoon: Timor Lorosae [2007]**

Attentive to the sociological changes which the city of Setúbal underwent over the past four decades, not only in terms of its changing population, but also as a result from the deindustrialisation and the consequential increase in people employed in the service sector, the MTMG developed several actions with two major premises: first, to collect and preserve the material culture as evidence of the city's traditional communities (its factory workers, its fishermen, etc.), using oral history tools and developing an historical photographic archive, the *Arquivo Fotográfico Américo Ribeiro* [MTMG MMC].

Secondly, to tackle the new migrant identities that were redefining what being a *Setubalense*<sup>94</sup> meant. This second line of museological action was primarily materialised in a series of Encounters, which they named the *Tardes Interculturais/ Intercultural Afternoons*. These Encounters occurred regularly several times a year, since 2003, and were only interrupted in 2016 for the remodelling works the building has been undertaking since. The museum organised approximately 100 Intercultural Afternoons, during this period. They were a variegated event: part lecture, part debate, part celebration, with food and traditional music and dances from the community that was being represented. And it was a cooperative event because it rested in the committed participation of those communities, from the planning of the Encounter until its materialisation at a given Saturday afternoon.



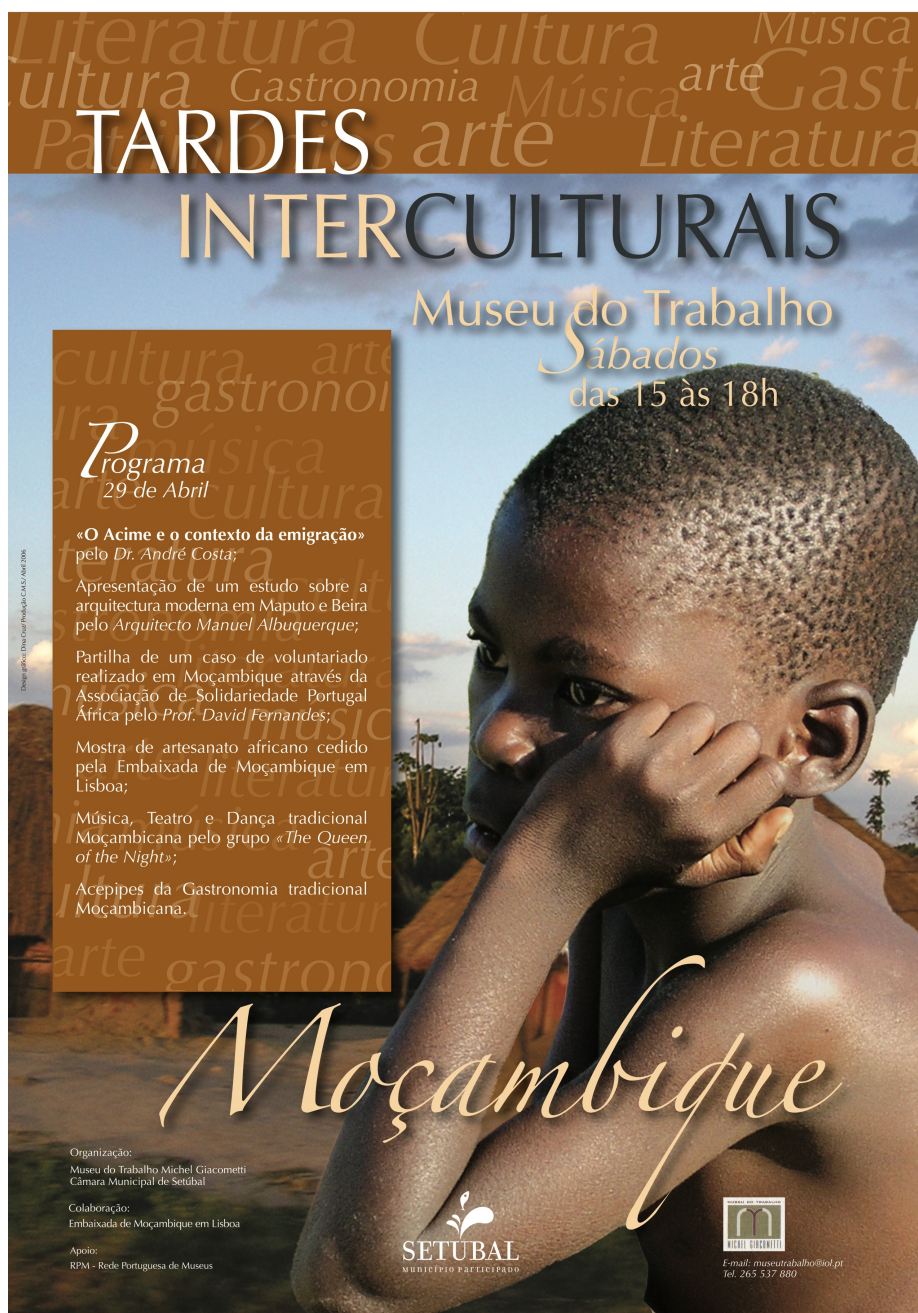
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**Figure 25 – Intercultural Afternoon: Hans Christian Andersen [2005]**

---

94 Individual from the city of Setúbal.





© MTMG

**Figure 26 – Poster of the Mozambique Intercultural Afternoon [2006].**

Literatura Cultura Música  
cultura Gastronomia Música arte  
TARDES INTERCULTURAIS  
Museu do Trabalho  
Sábados  
das 15 às 18h

**Programa**  
25 de Fevereiro

Visita guiada à exposição de pintura **"Deus criou... E o Homem re-criou..."** pelo autor Francisco Xavier Menezes

Apresentação da **Fundação Oriente e Goa** pelo Dr. João Amorim

**"Estado da Arte em Goa"** pelo Professor Doutor Teotónio R. Souza, Universidade Lusófona de Lisboa

Mostra de livros e revistas relacionados com o tema, cedidos pela **Fundação Oriente**

Apresentação dos livros:  
**"Goa - História de um Encontro"** da autoria de Catarina Portas e Inês Gonçalves, edições Almedina - Coimbra  
**"Paladares Pacíficos"** da autoria de Mónica Chan, Minnie Freudenthal e Inês Gonçalves, edições Almedina - Coimbra

Projectão de documentários sobre Goa

Música tradicional goesa pelo grupo **EKVAT**

Acepipes da Gastronomia Goesa

*"Quem vê Goa não precisa conhecer Lisboa"*

Organização:  
Câmara Municipal de Setúbal  
Museu do Trabalho Michel Giacometti

Parceria:  
Casa de Goa

Patrocínio:  
Fundação Oriente

Apoio:  
R.P.M. - Rede Portuguesa de Museus

FUNDACÃO ORIENTE

SETUBAL  
Município Participado

Logo of Casa de Goa

Logo of Museu do Trabalho Michel Giacometti

E-mail: [museutrabalho@iol.pt](mailto:museutrabalho@iol.pt)  
Tel. 265 337 880

© MTMG

**Figure 27 – Poster of the Goa (India) Intercultural Afternoon [2009].**





© Jean Jacques Pardete

**Figure 28 – Intercultural Afternoon: Cape Verde [2010]**

Being such a paramount event for the MTMG it was not a surprise to find several references to these Intercultural Afternoons in the data collected at this case study site. And the nature of these events brought to our data issues that were unique to this case study. Namely, issues of migration and ethnicity, but also topics like disability [MTMG].



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**Figure 29 – ‘Natal com Todos’ / ‘Christmas with Everyone’. A Christmas celebration with the participation of the APPACDM at the MTMG [2006].**



## Núcleo Museológico de Alverca

The *Núcleo Museológico de Alverca* is a small museum which occupies one of Alverca's oldest public buildings. However, NMA's location can pass almost unnoticed, and many *Alverquenses* may not know of the museum's existence, as confided by the NMA's director, Anabela Ferreira. [NMA AF] Nevertheless, for those who do know of its existence the museum provides services focusing on two of the community's groups: its children and its elderly citizens. For the local children they provide school visits, and for their senior users the offer is ample: ranging from arts and crafts ateliers, to writing workshops and computer lessons, to popular poetry sessions, to summer musical soirees with folk bands and Fado singers.



© NMA

**Figure 30 – Arts & crafts atelier at the NMA [2013].**



© NMA

**Figure 31 – Popular Poetry Session at NMA [2013].**

As stated previously, the museum is extremely focused on the village's material and immaterial heritage, as well as in the region's history. And that focus is translated to an extensive lectures programme, which invites specialists to share and debate related issues. The museum has managed to secure an interested audience for these monthly lectures. This emphasis on the village historical heritage is echoed in the research data gathered in this thesis, through participants voicing their keenness in these topics and revealing a sense of pride for the history of their village, for their past [NMA].





© NMA

**Figure 32 – ‘Alverca da Terra às Gentes’ ‘Alverca its Land and its People’: Permanent Exhibition at NMA.**



© NMA

**Figure 33 – ‘Alverca da Terra às Gentes’ ‘Alverca its Land and its People’: Permanent Exhibition at NMA.**

For the NMA's director focusing on the village history and heritage was acutely relevant given the sociological transformations the village endured. Not only due to the region's deindustrialisation, but also with the growth of the city of Lisbon transforming Alverca as one of its many dormitories. She believes that these new members of the community should be able to know the village's history, thus reinforcing their new identity [NMA AF].



© NMA

**Figure 34 – 'Escola do meu Tempo' / 'School in my Time': Temporary Exhibition [2012].**



© NMA

**Figure 35 – 'Brincadeiras de Criança' / 'Childhood's Play': Temporary Exhibition [2013].**

### **Final remarks**

Again, we return to the complex issue of identity, as discussed in this thesis literature review, Chapter Two. Identity has many faces. The ones every human being comes to recognise, either permanently or transitorily throughout her or his life. Identities which could either have been externally assign to her or him, or could be the result of a lifetime of picking and choosing aspects of her or his life, trying and abandoning them, curating the individual's sense of self. But also, the ones that we recognise as describing determined cultural and social constructs. Identities overlap. Can became conflicting. Both in societies and in individuals. In the previous Chapters, we have attempted to describe the ways in which this complex concept arose in this thesis data, presenting a possible, and hopefully valid, interpretation.

Over this Chapter, we have presented what we believe to be additional ancillary forms of adult engagement recognised in the analysis of the data gathered. We have addressed a particular cohort in this research participants, the Social Networkers, we have looked at how the strong and involved leaderships in these two case study museums have contributed to deepen the engagement with their visitors, we have also explored the benefits of 'sensitive research methods' by describing a participant-led 'guided tour' method of inquiry, and finally we have addressed the dissimilarities we have recognised between the two case study museums.

In the next Chapter, we present this thesis conclusion and address possible ways to move the research further.

## Chapter Seven: Conclusion

### 7.1. Revisiting the Research Problem

As stated in the Introduction, Chapter One, this thesis aimed primarily to understand the nature of adult sustained experiences in their interaction with two particular Portuguese Local Museums, over a considerable period of time. Specifically, this thesis examined the engagement which two community-based museums, the *Museu to Trabalho Michel Giacometti*, in the city of Setúbal, and the *Núcleo Museológico de Alverca*, in the village of Alverca, were fostering with their older adult communities.

Based on the *a priori* impression that Portuguese Local Museums were providing a distinct environment, which encouraged a thriving community atmosphere and deeper engagements with some of their older adult audiences, this thesis had the following **research objectives**:

Firstly, to explore the nature of adult sustained museum experiences (cognitive, social, aesthetical, etc.) and engagement in two Portuguese Local Museums, selected as case studies.

Secondly, to find out how and why those experiences are relevant to their lives as individuals, but also as community members.

Thirdly, to understand in what ways their museum narratives are acknowledged in their own biographical narratives.

These research objectives have translated into the following research questions:

Firstly, what is the nature of the experiences and engagement adults are gain as a result of their sustained relationship with a particular community-based museum?

Secondly, how and why those museum experiences are relevant to their lives, and, in a broader scope, to their community?

Thirdly, how are those museum experiences narrated within their larger biographical accounts?

To respond to these research questions, a qualitative research design was decided upon because it offered the best methodological path to explore the multi-layered phenomenon of an individual's experiences. We were not looking to acquire statistical data regarding these two museums, or their audiences; on the contrary, we were interested in exploring the nature of those relationships (Silverman 2014). Thus, a multiple case study design was envisioned and the selection of the two case study museums was achieved after sending out an e-mail questionnaire to all 46 Portuguese Local Museums, at the time accredited by the *Rede Portuguesa de Museus* / Portuguese Museums Network. The responses to this questionnaire allowed us to identify two museums that were both specifically providing museological programs and activities for its older visitors and, simultaneously, were interested to participate in the present PhD research project.

After the selection of the two case study museums, the research moved to the implementation of its sampling procedures, which opted for a purposeful sampling (Patton 2002). As detailed in Chapter Four we opted for participants who had a sustained engagement with one of the case study museums, which materialized in repeated visits over time. This idea of 'sustained engagement' was pivotal to the subsequent research and was inspired by the work of Everett and Barrett (2011). These authors were also influential in this thesis interest in Narrative

Inquiry as a potential ‘sensitive methodology’ (Watson 2007: 10) to work with museum visitors.

Next, 20 museum visitors were interviewed, 10 from each museum. The interviews followed an open-ended semi-structured script. But having been influenced by Narrative Inquiry encouraged us to become responsive to the participants’ line of thought. The data gathered with these interviews amounted to over 1500 minutes of recordings. Additionally, five members of staff of the two museums were also interviewed. The field work was finalized with an auxiliary interview method, which used participant-led ‘guided tours’ as a form to collect extra, narrative embedded, data.

Fundamentally, the underlying intention of this research work was to recognise and read into the participant’s narratives regarding their prolonged museum experiences at the two case study museums, and the ways those participants integrate them within their own biographical recollections. The interview testimonies generated by this research were approached as personal narratives from which meaning derived, not only by the theoretical links that we have established, notably in Chapter Two, but also by internally exploring the individual narrative’s integrity. Our interpretative process derived not only from an updated Grounded Theory approach but also by the use of Narrative Inquiry inputs regarding the need to find internal coherency in our interpretation of the individual’s narrative.

As described in Chapter Five of this thesis, during the analysis of the data across the two museums it became evident that the emerging data-grounded categories overlapped the two case studies, and were operational in both research contexts. Hence, we decided for a thematic analysis and presentation of our findings.

## 7.2. Summary of the thesis findings

Grounded in the data collected, this thesis proposes a fundamental key argument. The one that participants in this study engaged in sustained relationships with their local museums as part of their ongoing identity construction process. It is this thesis's understanding that the identity construction process that this thesis has identified is justified in what Rounds (2006) described as 'identity work in museums'. As mentioned in this thesis literature review, Chapter Two, identity work is a term first used in the museum literature by Rounds wanting to convey 'the process through which we construct, maintain, and adapt our sense of personal identity, and persuade other people to believe in that identity.' (Rounds 2006: 133). This thesis has examined Rounds's notion, developed in the US, in the context of Portugal. It is proposed that the Portuguese individuals also choose to participate in the 2 museum's different activities over an extended period of time as a self-identity strategy, which allows them to construct, maintain and improve their idea of selfhood. As Giddens notes:

Self-identity [...] is not something that is a given, as a result of the continuities of the individual's action-system, but something that has to be routinely created and sustained in the reflexive activities of the individual (Giddens 1991: 52)

Identity is a complex and multidimensional issue. Identities are fluid and changeable (Abercrombie, Hill & Turner 2006: 190). And identities can be perceived both internally, as the way we see ourselves; and externally, as the way others see us. Identity can either describe more stable aspects of our personality, such as gender, ethnicity, nationality, religion, etc.; but can also refer to the more circumstantial aspects of the roles we assume in different situations of our lives. However, identity can also be defined as a very intimate process of self-construction in which, by a manner of selection, individuals curate the



self they aspire to. It is in this last definition of identity that our findings can be best understood. The curating of the individuals' identities has a translation into the individual's actions, namely for this thesis, in the way they engage with these museums.

Thus, this thesis has proposed that, from the analysis undertaken, participants' identity work was mainly clustered into three major categories, coined as '*Learners*'; '*Cultivated*'; and '*Amateur Collectors*'. Unlike Falk's categories, they do not describe the shifting entry-identities all visitors assume at any given visit (Explorers, Facilitators, Experience Seekers, Professional/Hobbyists, Rechargers, Cultural Affinity and Respectful Pilgrims (Falk 2009: 64), although they share similarities with them, but refer to a more stable and ongoing process of identity work, the one of acting towards the self they aspire to. It is this thesis's understanding that through their repeated visits to the two museums examined, these participants actualise aspects of their identity that contributes to the consolidation of their self-vision. The identity categories that this thesis has proposed are the ones that, in our view, can best describe the identities our participants have been constructing, and aspiring to, throughout their lives. Accordingly, the Learner prefers museum experiences that validate their mind-sets about what learning should be; the Cultured values experiences that expand their cultural *syllabus*; and the Amateur Collector favours the opportunities to enhance their specific knowledge and expertise.

This thesis also recognised a fourth group, the Social Networkers, for whom the sustained connection with the museum was, essentially, a means to remain socially active and engaged, particularly for those who were facing the challenges of their new life-cycle: having retired, having been widowed, or facing other drastic changes in their personal lives. To those, these museums offered inclusive opportunities to maintain their social connectedness with the world.

In sum, thinking of this thesis's initial research questions we propose that: firstly, regarding the nature of the experiences and engagements adults obtain as a result of their sustained relationship with a particular community museum, the data has led us to suggest that those experiences are essentially of identity building. The engagement that these individuals have sustained and maintained with their local museum is inscribed in their on-going identity work, as suggested by Rounds (2006).

Secondly, these museum experiences are relevant to their lives precisely because they provide the material to reinforce the identities individuals have chosen to foster. For instance, when an Amateur Collector can assess specialised information in the museum about her/his area of expertise, or interact with the professionals in the field it reinforces her/his self-image as someone who is knowledgeable in the field, thus reinforcing her/his identity. Or, when a Learner, particularly one whose formal education was interrupted by external forces, uses the museum as a surrogate of the learning opportunities he or her was forced to miss out on in their earlier life. The data in this research has revealed the clear links these individuals establish between their museum experiences and their memories of their long-lost school days.

Thirdly, with regard to our final research question concerning the way the participant's museum experiences are narrated within their larger biographical recollections, we have proposed that the process undertaken of data gathering through Narrative Interviews resulted in rich, multi-layered contextual frameworks that have underpinned many of this thesis interpretations.

Finally, the distinctiveness of the museological work done by the two case study museums, either the *Museu do Trabalho Michel Giacometti*, or the *Núcleo Museológico de Alverca*, argued throughout this thesis, should be also restated at this point. It is our understanding that this

thesis findings are deeply linked to the distinctive approach each of these museums has regarding their adult audiences and the engagement opportunities they provide. However, although they offer distinct models of museological work, given their differences in terms of size, human resources, scope, etc, we have argued that the typology of engagement they allow for is generally similar.

Similarly, some of this thesis findings are deeply connected with the historical conditions that shaped the country's sociological fabric. The need that some participants revealed for a 'educational surrogate' given their frustrated learning aspirations is profoundly interrelated with the educational paradigm of Salazar's regime (1926-1974). Advanced education only for the elites, and elementary education as a way to inculcate the values of the corporative State: *God, Fatherland, and Family*. Some of the participants we have interviewed came from very underprivileged backgrounds. Many saw their educational paths being interrupted by family imposition due to economic constraints. Some returned to school as adults, and kept looking for alternative ways to develop their cognitive and cultural curiosity. Others never felt they were allowed to. The context of their lives, extremely connected with the deprived socio-economic context of their formative years, act as an impediment to cultural inclusion. It would take them several decades and a major shift in the country's politics and economic structure to be able to feel part of a larger cultural reality, for instance, visiting a museum for the first time as senior citizens. Thus, the specificities of the country's socio-political history have undoubtedly affected this thesis interviewees and, consequently, their attitudes and responses towards education at large and in the museums in particular.

### **Thesis contribution to knowledge**

Thinking of the particular contribution that this thesis may claim, we would argue that this thesis research focus is novel, to the best of our knowledge, in the Portuguese museum studies literature and research projects. As stated previously in Chapter One, visitor studies literature in Portugal is still underwhelming<sup>95</sup>, particularly when it concerns older adult audiences, and it is mainly focused on statistical trends. The 2012 study developed by the partnership between the *Fundação Calouste Gulbenkian* and the GAM, ‘Museums and Senior People in Portugal’, was the first to look at this specific age group in a more comprehensive way (Teixeira, Faria & Vlachou 2012). However, it is still very focused on the Portuguese museums’ provision for audiences over 65 years old and less concern with the nature of the individual’s experiences these programmes can elicit.

Regarding what we consider to be the main theoretical contributions to the subject of identity in museums, those of Falk (2009) and Rounds (2006), this thesis may be seen has a complement, in so far that it recognizes the validity of Rounds formulation of ‘identity work’ in a completely distinct research scenario: in Portugal, studying Portuguese local museums, with a specific group of participants. As for Falk’s taxonomy regarding identity-related visit motivations (2009), we have found similarities in our own taxonomic effort, but we have proposed a parallel framework of interpretation based on the sustained engagement relationship these local museums and these visitors are involved. The research undertaken also allowed us to or recognise the validity of Pekarik, Doering and Karns (1999) initial taxonomy regarding museum experiences. Our participants have described experiences which can be

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<sup>95</sup> As mentioned in the Introduction Chapter, the first national visitor study to the Portuguese National Museums was presented in May 2016. It inquired 13853 visitors to the 14 National Museums. The first general conclusions of the study revealed that the 67% of the Portuguese visitors have a university degree and that the majority are between 35-44 years old. In <http://www.portugal.gov.pt/pt/ministerios/mc/noticias/20160516-mc-publicos-museus.aspx>

categorised as either, or both, object experiences, cognitive experiences, introspective or restorative experiences and social experiences.

Likewise, Barbara Soren's (2009) theory regarding transformative museum experiences was also recognised in this thesis data, particularly in respect to how motivational experiences, such as those of identity building, can lead to sustained transformation.

We believe that this thesis has made an initial contribution to the discussion of identity motivated engagement in Portuguese local museums. And this thesis may have provided a new lens through which we can look deeper at the role these Portuguese local museums can play in these individuals' lives.

Additionally, we believe that another relevant aspect of this research can be found in the relational quality (Everett & Barrett 2012) between the researcher and these research participants. By adopting narrative inquiry inspired interviews, and by exploring an additional method of data gathering through participant-led 'guided-tours' we may have facilitated the necessary trust and engagement with the researcher and these research participants. That may have arguably helped to generate the personal embedded data that we were striving for.

### **Thesis limitations**

However, we also recognize the limitations of this research, be it in its scope (we have investigated only two local museums), be it in its geographic context (we have looked at museums in the Greater Lisbon Area), be it in its numbers (we have interviewed a relatively small number of individuals). These limitations compromise a simplistic generalization of this thesis's findings. However, that was never inscribed in this research design and objectives. The data gathered by the research is, undeniably, profoundly contextual but it is precisely this contextual quality that has allowed us to move deeper in the interpretation of the data gathered.

Additionally, we were not able to respond to part of one of our research questions, namely how these individual museum experiences are relevant to their communities as a whole. We could, nevertheless, make an educated guess proposing that there may be a process of ‘contamination’ in the sense that the positive experiences that these individuals have may trigger other members of their community to replicate them. The data definitely points to the need some of these participants have to share their museum experiences with their friends and family members. But we have not gathered sufficient data to clearly suggest if and how it happens.

### **7.3. Further implications and practical applications for this research**

To answer the much more difficult question of ‘why your thesis matters’, and what is its relevance vis a vis the museological debate and literature, and the extent to it can impact on these local museum’s museological practices we can outline some possible implications and applications: firstly, for this thesis case study museums it may be valuable to have a theoretical interpretation of some of the relationships they are fostering with their visitors, particularly, with their older audiences. To know their motivations, their expectations, what they value in those interactions with the museum, but also what is challenging for them should prove valuable to the museums. Despite much of the museum learning literature having stressed the value of ‘unschooling’ museum learning experiences (Pekarik 2010, Duke 2010), an idea to which we are personally sympathetic, participants in this study, particularly those who had an interrupted formal education, have declared a keenness for learning oriented museum experiences, comparing their ideal museum learning experience to a ‘school lesson’. This, at least to us, came us an unexpected revelation and it may be a valuable insight for these museums’ future adult learning programmes.

Concurrently, these museums may also decide to provide, or to increase provision of, dedicated programmes for the identity cohorts identified by this thesis. For instance, specific activities for their Collectors, specific activities for their Social Networks, specific programmes for the Learners and the Cultured.

Secondly, there may have been implications for these research participants in so far as having been interviewed about their sustained relationship and engagement with their local museum may have provided them a first opportunity to critically analyse that relationship and to find their own meaning inside that reflexion. Another possible implication for, at least, some of the participants may have been a boost in their sense of self-worth, given that despite their minute formal education, they were treated as important people with valid voices whose experience was crucial to this PhD research.

#### **7.4. Recommendations for further research**

As we have been pointing out, this research was bounded by intended delimitations inscribed in this thesis research design. These limitations were, for instance, the number of case studies, the age-group it addressed, or the nature of the museums under study. It would be interesting, in the future, to compare this thesis's findings with findings from new research projects that would address, for example, another type of museum, other age groups and museums from distinct parts of the country. It would be very significant to investigate if, for instance, the bigger national museums are fostering similar engagements with some of their regular visitors (museum friend's groups, etc.) and if parallels can be drawn in terms of the identity strategies this thesis has identified.

It could also be recommended to explore the two initial research objectives that, in the end, this thesis failed to explore: firstly, to investigate the ways museums practitioners working in Portuguese local museums regard and work towards adult learning, and their visitors sustained engagement and, secondly, to develop a praxis-oriented platform that could improve the relational quality between these museums and their communities, for instance moving beyond the statistical visitor profiling and engaging, themselves, in Narrative Inquiry-inspired praxis-oriented research.

Concurrently, this research has also unveiled additional aspects of the museum experience that could benefit from further research. It could be a fruitful area for the Portuguese museum studies literature to reflect on the sensory ways of engaging with the museums and their objects, which some data in this research has pointed to (Dudley 2010, Golding 2009, 2010).

### **Final note on academic voice**

An intended goal of a doctoral thesis is the development of a distinct academic voice. It is, for some of us, a challenging objective to move from what others have considered, to find our own voice, underpinned by research considerations. It has been a tentative process for this researcher and finding a coherently distinct academic voice has taken some 7 years to achieve. Writing this Ph.D. thesis, has undoubtedly, been our first step albeit sometimes tentative, towards finding this personal academic voice.

The Narrative Inquiry methodology adopted in the thesis privileges voice and the research method involves interviewees in what Golding (2009) terms respectful conversations. As the PhD researcher in Portugal we were impelled by Narrative Inquiry to listen intently and respectfully for some hours with each interviewee as they struggled to find their words, crying over their sad memories, and eyes shining with joy and pride as



they recalled happy relationships with the museums. In a similar movement, the researcher struggled to find her voice as they interpreted the data collected.

It is, perhaps, here, that I should note the additional difficulty of finding that voice using other than my native language. Because a language is evidently made of words, but essentially made of ideas, of cultural frameworks that sometimes can be 'lost in the translation'. It was one of those cultural frameworks that has shaped the form of this PhD researcher's voice. As first mentioned in the Introduction Chapter, throughout this thesis, I have used the personal pronoun 'we' instead of the usual 'I'. This issue was debated with this thesis supervisors, but, in the end, my personal cultural framework pulled me to use the formulation 'we'. Mainly, because that would be the way it would have been written in Portuguese. Or, possibly, it could be due to the need to develop a distant, objective voice. However, I prefer to think that it is rather a recognition of how one's work is always produced 'on the shoulder of giants' *nanos gigantum humeris insidentes*.

## Appendices

Appendix 1: Sample interview questions for museum practitioners

Appendix 2: Sample interview questions for museum visitors

Appendix 3: Sample of research information flyer

Appendix 4: Sample of informed consent form

## Appendix 1: Sample interview questions for museum practitioners

1. Please tell me about you and the work you do at this museum.
2. In your opinion and considering your experiences, what do you think has been the role of local museums in the Portuguese museology?
3. What have been its strengths?
4. What have been its limitations?
5. What are the roles of the educational service in the everyday routines of your museum?
6. Do you believe there is a clear theoretical basis underpinning your museum educational practices? Give examples, please.
7. Recently, in a Conference, the Spanish museologist Maria Acaso alerted to the what she considered to be 'bulimic pedagogies', typical of school contexts, and urged museums learning services to offer experiences that could cause Surprise, wonder and Detonation. What do you think of it?
8. What has been the importance of adult audiences at this museum?
9. Thinking about the museum's social mandate towards its communities, what is the importance you give to developing

sustained relationships with different members of those communities and why?

10. What does it mean to you to open the museum to visitor's participation?
11. What will be in the future the priorities of this museum regarding its adult visitors?

## Appendix 2: Sample interview questions for museum visitors

### Personal / biographical context

1. Tell me about yourself.
2. Do you live in this town? For how long?
3. If you don't mind, I would like to know how was your educational path. Where did you study? For how long?
4. Do you still work? Where?
5. Are you retired? When?
6. How did retirement make you feel?

### Personal history and museum experiences

1. Do you remember the first time you visited a museum? How old were you? What were your impressions?
2. And regarding this museum, do you remember your first visit? Would you like to tell me the circumstances of that first visit?
3. How often do you visit this museum? Do you regularly participate in the activities that take place here? And why?
4. Do you come alone, or do you prefer to come with friends/family? Why?
5. How would you describe the time spent in this museum?
6. Do you believe museums to be important learning places? Mainly for children, or for adults as well? Why?
7. When you visit this museum or participate in one of its activities, do you have specific goals in mind?
8. Is learning a motivation for your visit? Why?
9. Do you recall any special experience you have lived through in this museum? How would you describe it? How did it make you feel?
10. Have you ever changed your mind completely regarding any given subject after something you have seen, heard or experienced in a museum?
11. Would your life be different without this museum? In what ways?
12. Do you think museums can transform the lives of their visitors? Have they changed yours?
13. Do you recall when this museum first opened?
14. Do you think this museum is valuable to your local community? Why?
15. Do expect to continue to visit this museum in the coming years? Why?
16. Have you ever engaged in a partnership with the museum? Who initiated the contact? How would you describe that experience?
17. Is there something you would like to add to our conversation?

### Appendix 3: Sample of research information flyer



School of Museum Studies,  
University of Leicester, Reino  
Unido.

Um projecto de Margarida Melo,  
Bolsista da Fundação para a  
Ciência e Tecnologia

margaridammelo@gmail.com  
Tel. 914925061

**Projecto de  
doutoramento:**

***Adults Learning in  
the Local Museum***



**FCT**

**Fundação para a Ciência e a Tecnologia**

MINISTÉRIO DA CIÊNCIA E DO ENSINO SUPERIOR

## Appendix 4: Sample of informed consent form

### **Declaração de Cedência de Direitos de Autor e Consentimento para Registo de Entrevista e Uso de Dados**

#### **Nome do Projecto: Adults Learning in Portuguese Museums -**

Projecto de Doutoramento de Isabel Margarida Teixeira Monteiro Melo, a ser apresentado na School of Museum Studies, da University of Leicester (Reino Unido)

O propósito desta declaração é o de possibilitar que o projecto de doutoramento *Adults Learning in Portuguese Local Museums* (título provisório) retenha permanentemente e faça uso do registo recolhido.

Eu, ARNALDO BARROS,  
na qualidade de actual proprietário dos direitos de autor do conteúdo recolhido neste registo sonoro (ou seja, das palavras por mim proferidas no decurso desta entrevista), declaro a cedência desses direitos de autor ao projecto *Adults Learning in Portuguese Local Museums* (título provisório), na pessoa de Isabel Margarida Teixeira Monteiro Melo.

Deste modo, declaro abdicar de quaisquer direitos morais que presentemente possuo sobre o registo recolhido e reconheço que o conteúdo das gravações nunca será usado de forma depreciativa ou derogatória. Registo ainda que tenho o direito de ser correctamente identificado/a em todos os usos que venham a ser feitos desta gravação, simultaneamente, reconheço que não haverá lugar a qualquer pagamento em troca deste consentimento.

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Tomo, ainda, conhecimento de que, a qualquer momento, posso retirar o meu consentimento para a participação neste estudo. Posso ainda decidir retirar apenas parte do conteúdo recolhido.

Finalmente, registo que os meus dados pessoais não serão transmitidos a terceiros, sem o meu consentimento.

Desejo anonimato: Sim \_\_\_\_\_ Não X

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