

# Born to be OPTI

## A new model for participatory museum management

LORENA SANCHO QUEROL, KALLE KALLIO & LINDA HEINONEN

**Abstract:** *Society in the Museum (SoMus) is a research project in the field of sociomuseology where culture is viewed as an essential axis of developmental processes and museums as key tools for the exercise of cultural citizenship. The project intends to identify, analyse, systematize and disclose some of the most interesting emerging models of participatory management underway in four European museums. In this article we present the anatomy, the strategy and the challenges of one of the Nordic partners, the Finnish Labour Museum, and its current management tool, the OPTI Participatory Management Model. The model has been adapted from the business world to serve as a critical museological tool and to enhance participation in cultural institutions. It is a response to the paradigmatic transition that museums face when actively engaging in a participative culture.*

**Keywords:** Finnish Labour Museum, sociomuseology, participatory museum management, labour history, SoMus, OPTI Model.

*Society in the Museum. Study on Cultural Participation in European local museums (SoMus)* is a post-doctoral research project by the first author of this article.<sup>1</sup> With a museological perspective the focus is on museum management. Confronted with conventional management models, whose aims, work dynamics and narratives are usually defined by closed teams and a predefined logic, SoMus focuses on participatory models where society and museum form part of the same network to define logics, uses and meanings of the museum. From this perspective and considering local museums as meta-networks of communication (Castells 2011:779) and key

tools of cultural development, SoMus aims to fulfil a set of objectives: identifying, analysing, systematizing and disclosing some of the most prominent European practices of participatory museology in four museums, that have been chosen for the innovative character of their daily practices. In addition, the project will define ongoing models of participatory management in these museums, allowing them to serve as role models for other cultural institutions.

SoMus works with participatory action research (PAR)<sup>2</sup> based on a theoretical landscape combining meanings, values and experiences coming from three worlds: current

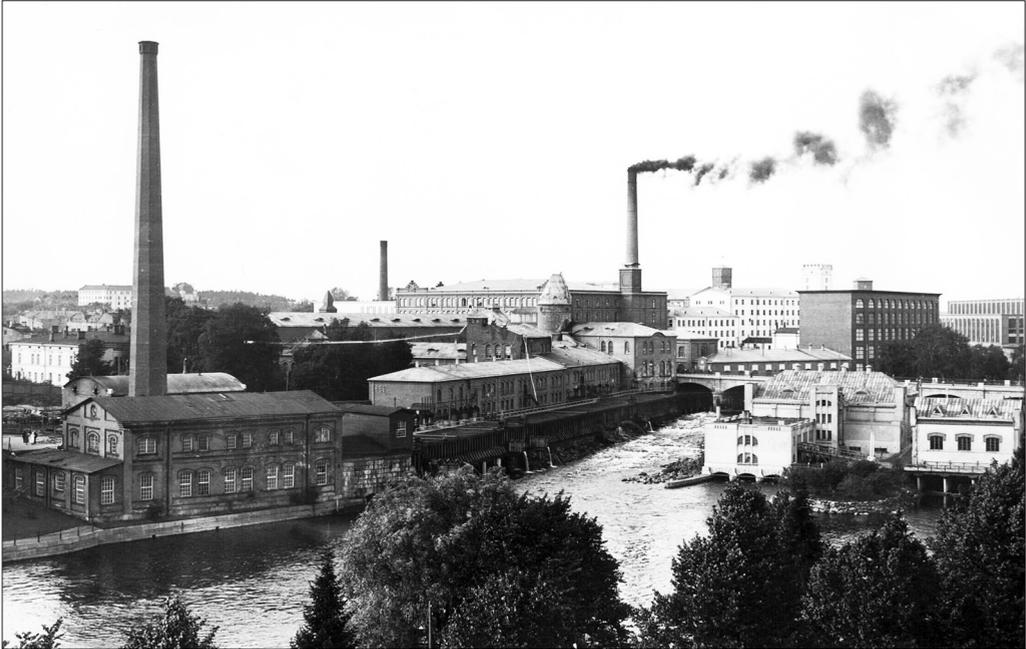
106 action-based sociomuseology (Sancho-Querol & Sancho 2015:215–216); the sociological theory “ecology of knowledge” (Santos 2007), and inspiration from UNESCO’s work on cultural diversity (UNESCO 2001, 2003). The first theory brings to the forefront a participatory understanding of museums based on the concept of *co-creative project* (Simon 2010:187) developed with a bottom-up perspective. The second promotes a democratic notion of knowledge by recognizing complementarity between scientific/popular, local/global and northern/southern forms of knowledge production. The third promotes open concepts and practices related to the roles of culture and heritage in contemporary societies, taking into account current cultural hybridization processes (Canclini 2003), transition values and the urgency of creating alternatives to hegemonic neoliberal cultural policies, among other matters. These three theories are connected by an inclusive, democratic and evolutionary concept of culture, which we consider the overall foundation for integrated developmental processes (UNESCO 2015, Dessein et al. 2015), as well as by a participatory grammar.<sup>3</sup> A common presumption is that one learns from participatory behaviour by sharing and analysing the experiences, ideas and daily challenges related to diverse forms of micro- and macro-participation (Bordenave 1983:212–216) and by analysing the links between them.

Nurturing dialogues between Mediterranean and Nordic museologies, the SoMus team has been working since 2014 with four partners from Finland, Sweden, Spain and Portugal.<sup>4</sup> Thus, in 2014 we worked with the Portuguese partner, the Costume Museum of São Bras de Alportel<sup>5</sup> (MuT), to define its management model, The Model of Museum in Layers (Sancho-Querol & Sancho 2015), and in

2015/16 with the Finnish partner, the Finnish Labour Museum<sup>6</sup> (FLM), to learn about its methods, experiences and reflections. In this article, we present the results of this last process of co-analysing, co-thinking and co-systematizing FLM’s daily management from a participatory perspective, considering its current values and objectives. Step by step, we discovered that FLM has been working in between two worlds to create a challenging organizational tool for museums: for ten years, they have been adapting a business strategy tool to museology by using the principles of sociomuseology in order to provide contemporary society with an active role in the museum’s development. Some emerging questions were posed as a starting point: What kind of business tool did they choose for this experience? How are they adapting it to the principles of an alternative museology? What are the current and past limitations and challenges encountered? How can we learn from the answers to these questions to support transformative processes through museums?

FLM was chosen not only because it is considered the best museum of social history in Finland, but also because it develops its social function committed to the construction of intercultural dialogue. In addition the museum uses critical pedagogy and critical thought as a citizenship exercise. Equally relevant was their acceptance to cooperate with the SoMus team during years of intense work (2014–2019).

FLM chose SoMus to review their strategy and practices because its team considered it was time to improve, even more, the way the museum interacts with society. Furthermore, they wished to nurture cultural democracy and cultural development with their activist museology. Museums are spaces of exchange, negotiation and communication with society. They can help us to question reality, to



*Fig. 1. Smokestack industry on the banks of Tammerkoski Rapids. Photo: Finnish Labor Museum, 1900s.*

understand conflict, to accept and integrate difference, to enlarge cultural dialogue, to define our ways of life, or simply to better appreciate the intrinsic essence of our cultural behaviour. Next, this article demonstrates how FLM is enlarging exchanges, negotiations and ways of communication through its everyday museology.

#### **SETTING THE CONTEXT: TAMPERE AND THE CONTEMPORARY ECHOES OF AN INDUSTRIAL CITY**

The FLM is situated in the city of Tampere. Located along strong Tammerkoski rapids, Tampere was an industrial centre of Finland that remained, until the early 1800s, a small craftsmen town with a few hundred inhabitants (Haapala 2011:10–11). At that time, the

Scottish machine builder James Finlayson, one of the town's first entrepreneurs, was granted significant privileges for setting up his machine shop. This represented the start of the Finnish cotton industry. Succeeding Baltic-German owners made the Finlayson mill the first large-scale factory in Finland and the biggest company in the Nordic countries (Haapala 2011:12) (fig. 1).

In the Finnish timescale, industrialisation began exceptionally early in Tampere. As decades passed, large textile and shoe factories, machine shops, paper mills, as well as smaller brick factories, sawmills and foodstuff companies were established in Tampere (Rasila 1984:5–112). The industrial city was nicknamed “the Finnish Manchester”, which had a positive meaning: for poor and young provincials, factory work offered



Fig. 2. Aaltonen shoe factory workers. Photo: Finnish Labor Museum, turn of the 1930s.

better social conditions and stable incomes (Haapala 2011:15–16). Thus, Tampere became a workers' society. No other Finnish town had a population that included such a high proportion of working-class people: by 1900, three out of four Tampere inhabitants were workers. Due to the textile industry, Tampere was a town with an unusually high figure of self-supporting women (Rasila 1984:248–265).

Working people were active participants in the Workers' Association, local trade unions, and even founded their own co-op, bank and insurance company in Tampere. Workers also established their own sports clubs, as well as art and educational institutions in the city that flourished throughout the 20th century (Jutikkala 1979, Koivisto 1999:244–272) (fig. 2).

In the 1950s Tampere was still an industrial city. Slowly at first, then at an increasing speed, the number of industrial workers in Tampere decreased. The city's industry was directed exclusively at the domestic market and the release of imports meant that competition grew tougher. At the same time, industrial operations were rationalized and automated (Haapala 2011:70–71). The downward spiral of the smokestack industry culminated with the 1990s recession. Companies left the shores of the Tammerkoski Rapids for either cheap production countries or new premises on the fringes of the city. Nowadays, there is still one operating factory by the rapids, the Tako cardboard factory (Peltola 2014:198–199). The old industrial precincts in the city centre,

except for the Finlayson cotton mill, have been demolished and turned successfully into residential, commercial and leisure premises. At the cotton mill, around two thirds of the industrial buildings have been preserved and converted to offices, restaurants and museums. The site has become a vibrant quarter as hundreds of people work there again. The city's identity has always centred on the Finlayson factory.

### **THE FINNISH LABOUR MUSEUM AND THE CHALLENGE OF FAIR HISTORY**

During the last decades of the 20th century a variety of museums began to emerge all over Finland with the intention of documenting the most recent chapters of history. Among them was the first labour museum, located at Valkeakoski, which opened its doors in 1960. It was an open-air museum dedicated to the life of paper mill workers (Eenilä 1965:6–10), similar to other small open-air museums distributed all around the country at the time. Labour heritage was also presented in former industrial buildings, trade unions' course centres and memory rooms, usually run without the help of museum professionals. On the background of this cultural dynamics, the first plans for the creation of a national labour museum were conceived between the late 1970s and early 1980s. At that time, the Workers' Museum in Copenhagen was already open (1983) and Nordic countries like Finland wanted to follow this example (Kallio 2010:122–123).

The first step was the creation of the Labour Museum Association, the organization behind the present FLM, in 1988 (Kallio 2010:121), which concentrated during the first five years on collecting. This Association is an NGO<sup>7</sup> that has grown steadily, today including 31

organizational members and representing approximately 1,9 million individual members. The Association was supposed to assist volunteers in smaller labour museums but practically many of the scattered collections were soon donated to FLM.

Finally, in autumn 1993 the museum opened to the public in the Finlayson area, with the aim of preserving and displaying working-class history in the milieu where Finnish industrial society was first developed. As the textile factory was gradually closing – production finally stopped in 1995 – and the conditions for this small museum in the Finlayson area were restricted, exhibition rooms were modest and visitor figures barely exceeded 5,000 per year. However, as the museum was granted the status of a national museum of working life and social history by the government in 1996, the state and the city council promised to upgrade the museum's facilities (Ahola *et al.* 2013:79). The present FLM was inaugurated by the president of Finland, Tarja Halonen, in the autumn of 2001. It remained in the Finlayson area, but now it spread over a three-storey building with a 5,000 square metre area for exhibitions, collections, events, library and workspaces. Collections reached already 60,000 objects and 350,000 photographs, and thereafter visitor figures begun to regularly exceed 20,000 a year. At that time, producing a high number of exhibitions and increasing the collections seemed to be the primary aim of the institution. Collecting opened possibilities to work with different communities and provided opportunities for widening the traditional definitions of labour heritage. However, this quickly became very demanding for the staff and challenged the preservation capacity of the museum (Werstaan 2006). The consideration of these issues was the starting point for the creation of the museum's first Strategic Plan.

110 **2006 AND THE DEFINITION OF THE FIRST MUSEUM'S STRATEGY**

The museum's first Strategic Plan was created in 2006 as a result of the need of reorganizing the museum's daily management and to solve obvious problems with long-term planning. Balance Scorecard (BSC), one of the most common tools used in the business world, was selected for strategic management.<sup>8</sup> The main reasons for this choice were the simplicity of its structure and its easy application (compared to other tools such as EFQM<sup>9</sup>), as well as its strategic touch (mostly absent in models like CAF<sup>10</sup>). At that time, Finnish museums were developing a novel evaluation model based on CAF.<sup>11</sup> In 2006 FLM's new director decided to adapt BSC with the help of the museum's team, to develop FLM at an organizational level and reinforce its social and cultural impact on society. Inspiration came from the work of Kaplan & Norton (2000), the interesting results obtained by some city museums in Finland, and works focusing on the social role of museums linked to community-based thinking (Weil 2010). The objective was to improve the way that processes, priorities and projects were defined, to clarify terms of responsibility for each staff member (especially the heads of departments), and to achieve a systematic approach for the whole museum. Therefore, FLM began to reorganize its departmental management, grouping similar task together to be able to talk about *learning and growth, processes, customers and finances*.

According to the museum's new strategy, exhibitions should last longer and collecting should be done more carefully. For this reason, the museum ceased collecting tools, machines, workers' housing and themes already well documented by city museums in Finland, and began focusing on difficult and daring heritage,

for example sexual minorities, activists and outcast groups (Työväenmuseo Werstas 2006:10–11, 35–38). In addition, while testing the new tool with 2006 data, they decided to introduce some relevant changes to the BSC basic structure to strengthen their project:

Firstly, *finances* were substituted by *impacts*. This is a common solution in public organisations using BSC in their management (Kallio 2007:109–110). In the Finnish Labour Museum, impacts focused not only on the demonstration and valuing of the labour heritage, but also on the social and cultural effects of the activities implemented by the museum with the local society.

Secondly, the museum's *mission* and *vision* were defined with the goal of strengthening FLM's role in the cultural development of society. Summarizing original texts, the vision was to stabilize the position as the leading museum of social history in Finland and as the most visited attraction in the Finlayson area for 2020 (Työväenmuseo Werstas 2006:4). The mission was expressed within a long paragraph that can be summarized as to be the national museum of working life and social history, and of labour culture in the Great Museum of Finland. With time, the FLM team realized it was necessary to express their mission in a simple and stronger way, by focusing on the essential matter that gave meaning to their existence. To that effect, in 2009 it was re-defined as follows: "FLM is a national museum of working life and social history, located in the historical industrial area of Finlayson. Museum activities are aimed at supporting an equal and solidarity society, sustainable development and human rights." As a result, FLM implemented its first full BSC in its 2007 Annual Management Plan by developing the BSC cards for each of its departments. (Table 1.) In the years that followed, this *adapted*

BSC was used for the yearly management of strategical aims and objectives, according to museum resources.

In 2015, we the authors, started analysing the last ten years of work carried out by FLM during which they used their own BSC strategy with the aforementioned developments. We concluded that the most *positive aspects* of this management tool were that it helped the museum's team to build trust on their work; it gave a professional touch to the organization; and it helped to increase its credibility with the board of the museum, other staff and the museum's funders. At the same time, it forced the team to reflect each year on FLM learning and growth, processes, customers and impacts, not forgetting any of them or the connections between them during the yearly planning and the daily life of the museum.

Referring to the *negative aspects* gained from this experience, it is clear that the BSC forced the team to take a fixed approach at things, so that with the years, the cards themselves became almost compulsory. In fact, during the first period of adaptation, the impact area was not clear enough so the team only began to develop it in a deeper way after the implementation of their "family friendly attitude" (in 2006) and above all, after the implementation of the free entry policy (in 2010) and the last redefinition of the FLM's mission. With the short and challenging name of *Fair History*, FLM wanted to simplify and make more useful its mission in internal and external communications. At the same time, it could highlight the broad scale of activities, welcome different communities, and help to build a fair understanding of history giving voice to the underrepresented: ordinary people, minorities and marginal groups.

When in autumn 2010, the museum's board decided to waive the entrance fees as a way to

find new solutions to enhance the museum's social and cultural impacts, FLM became the largest free entry museum in Finland. This initiative brought not only a steady flow of visitors but it also made the museum a more attractive place for events and funders.

These two measures, free entrance and a new strategy with a strong mission, are presently still impacting the museum's management and have contributed to make "more human" its BSC strategy, promoting its social usefulness by breaking down different borders normally implied by a more traditional museology. Notwithstanding, years after all these experiences, and with the evolution of the FLM project, in 2015 the BSC revealed new deep weaknesses for the museum team.<sup>12</sup> From their perspective, the BSC's learning and growth used to take for granted that the results were achieved by staff, so it did not include possibilities of volunteers, co-operation with local organisations nor informal communities.

Internal processes were important in standardizing cataloguing or exhibition planning but, as FLM also works with society (communities, volunteers, users, stakeholders, partners), processes have other priorities and other kinds of relevance. If avoiding mistakes in industrial production can be understood as quality, when talking about museums using a participatory management and linked to society in different ways, quality is mostly based on networking, flexibility, agility and the ability to take initiative. Consequently, mistakes are part of the process and become a way of collective learning.

"Customer" is a crucial concept in business-oriented BSC but the concept misses enriching exchanges coming from a wider understanding of museum activities. For example, main customers for collecting and documenting are seldom the present-day users of museums,



*Fig. 3. Free entry effects at FLM: Museum volunteer Annikki reading fairy tales for children in African Presence in Finland exhibition. Photo: Finnish Labor Museum, 2015.*

more likely future or past generations. In addition, the logic of public funding is misunderstood if we assume that democratic states, municipalities, funding foundations etc. would act like customers. Maybe museums should not so purposefully use the concept of customers, if they are even unable to identify them.

From 2005, FLM wished to involve new partners in its daily work, not only to enlarge social interactions between museum and society or the cultural dimensions and impacts of the museum's work, but also because they realized they could not do everything by themselves. After free entrance was established, the customer perspective also changed radically demanding a much more participatory management, and the process

perspective became richer and more diverse. Therefore, due to the diversity of worlds interacting through the museum, making fluid processes was not so easy anymore. The FLM was being challenged by other social and cultural matters related to social history and working life, and above all, matters relevant to people's daily life (fig. 3).

During recent years, the BSC slowly became a stationary, routine process that became less productive and less useful for daily management. This fact allows us to better understand why FLM accepted SoMus' challenge to rethink their working model from a participatory point of view. The joint work could provide a good opportunity to update the model and take a step forward using as a starting point positive and negative results obtained since 2006. That

was the origin of the management model that will be presented in the next section.

**CURRENT CHALLENGES:  
LEARNING WITH THE EXPERIENCE,  
BUILDING THE PRESENT WITH PEOPLE**

One thing became clear in 2015 when we initiated our research at the FLM: the Balance Scorecard was a good option when the museum was looking for a new direction and for an internal organizational system. It was a useful tool to help deploying the strategy into the everyday life of all museum actions and departments; it helped to evaluate the dependences inside the organisation and clarified the complexity of the organisation's activities. Yet, due to the regular effort of evaluating and improving the daily management with their adapted BSC, and to the act of reflecting on the results from the point of view of the social role of the museum, we discovered that, in recent years, FLM slowly became a project deeply inspired by the principles of sociomuseology, that is, a project intrinsically compromised with society's integrated development. In fact, we could identify a set of characteristics that helped us reach this conclusion and that led us to believe that the best option to improve its management model should begin with the latest BSC version, made in 2015. From the methodological point of view the idea was to select the best practices and concepts emerging from experience – together with the reflections resulting from self-evaluation – and to compare them with their mission and the values they see as priority in the museum's daily life. Otherwise, to define their participatory management model we would only need our collective creativity, our shared sense of the museum's social role, our critical thought and, of course, a few drops of cultural utopia.



*Fig. 4. Dancing in the Workers Meeting Hall. Evening event inspired by 1960s Workers' cultural life, including both educational and entertainment activities and organized by volunteers. Photo: Finnish Labor Museum, 2014.*

Thus, according to our research and among the features connecting the FLM project to the sociomuseological line of thought we can highlight the following possibilities:

*Exercise of an inclusive management* based on: a) the museum's networking power (Castells 2011:774–782) through daily peer-to-peer interaction between museum professionals, and between them and different groups, collectives and local inhabitants, (i.e. networked subjects and local subnetworks); b) a multi-layered structure of decision making where challenges, projects and activities can have their starting point, or be driven by different subjects coming from different nodes of the meta-network (fig. 4).

*Activation of a wide concept of labour heritage nurtured by activism*, and focusing on daily life as well as difficult and daring heritages, with the objectives of: a) decoding and making visible marginal dimensions of social history and collective memories and, b) contributing to the construction of an inclusive society and to the collective writing of a *Fair History* where the current chapter is a shared responsibility.

*Reinforcement of cultural empowerment of local society by welcoming diversity*, and by embracing social, historical and cultural conflicts, acting as a mediator towards a more balanced intercultural dialogue.

*Construction of its own formula of sustainability* grounded in a system of meta-combination of financial support (public, private, local, national, European...), and multiscale resources (neighbours, inhabitants, labour associations, professional collectives, academic research, institutional partnerships etc.), by developing a solidarity formula focused on an understanding of working culture and history, and on improving sociocultural justice.

Linking all these dimensions of the FLM project and strategy, and working together with the museum team to apply SoMus methodology, we could achieve our final product: a suitable model for cultural institutions looking for participatory management, which is successfully put into practice by the SoMus Finnish partner. This methodology consists of three steps, previously defined during the working process with the Portuguese partner and that were refined with the FLM experience. They are a natural sequence of actions based on:

1. *Close analysis of the museum's project and practices*, mapping the participatory dimension of the daily activity and practices.
2. *Systematization of the different forms of participation* that have brought the project to life, considering its nature, its current objectives and methodological options, as well as the intentions of the people working on each one of them.
3. *Value the sociocultural dimension of the local heritage*, by choosing a symbolic element to represent the participatory model, with the aim of creating a conceptual and visual metaphor.

### **A NEW STRATEGY TOOL AT THE MUSEUM: THE OPTI PARTICIPATORY MANAGEMENT MODEL**

As a result of this process, during 2015 and until the spring of 2016, we mapped the daily activities of FLM and organized and systematized them to define the new working model of the FLM (table 1). It is called the OPTI Participatory Management Model. It emerges from the adapted BSC used at FLM during recent years (composed of four intertwined perspectives – learning and growth, processes, costumer and impacts – and orchestrated by the museum's mission), and from the recognition of society's diversity of roles in the museum's development and daily management.

From a systemic point of view, the OPTI Model presents three main innovations:

- *It is a multi-adapted strategic map*, including the museum's mission (defining its cultural reason to exist and its role in society's development), and four intertwined and balanced perspectives:
  - *Office and People*, as the concrete dimensions that make the museum's project real
  - *Tools and Impacts*, as the methodological dimensions that allow the institution to improve its diverse roles, and to identify, measure and evaluate its societal effects
- *It introduces a new bottom-up perspective to the project* by placing:
  - organization matters in the base (*Office*)
  - society involvement (*People*) as the key to the project's strategy, to empower other forms of knowledge and experience, nurturing proximity, enlarging and diversifying the museum's team through society networking
  - innovative and participatory *Tools* allow-

ing the museum to contribute to the deepening of our democracies and to the recognition of culture's role in current developmental processes

- *Impacts*, as the total amount of results of this model in action
- *It presents a diversification of challenges, responsibilities and compromises*, allowing museums to accompany current societal transformations. This measure has its reflections in the thematic perspectives' denomination or in the form they are interconnected to each other so as to build a balanced management.

This way, the OPTI perspectives involve the following matters:

- In the *Office*, we placed all the organizational and institutional matters that allow the museum to exist and to develop its project. Here, the FLM includes, for example: *agile organizational culture and effective management; economic sustainability; inclusive and equitable leadership*.
  - In *People* we develop a new concept of the museum's team, which comprehends different agents that go beyond the classical formula based on professional paid staff. By enriching the staff's knowledge and experience and nurturing the museum's meta-network, we find other layers of the museum's team made of volunteers, partners and other stakeholders. They help the institution develop its mission, diversifying projects, answering different (local/national/global) needs, empowering other dimensions of history, suggesting under-represented issues, or simply sharing the passion for heritage (table 2).
- Additionally, FLM recognizes the potential of museum users (which include every kind of frequent visitors using the museum as part of their daily life) as essential agents in the development of processes, as well as an excellent indicator of museum utility. In *People*, FLM includes *museum visitors, museum users, stakeholders, partners, volunteers and staff*. They also include, for 2018, the objective to create an "Index of participation" in order to measure different kinds and intensities of cultural participation at the museum.
- In *Tools*, we include the selected projects, processes and investments that help museum to realize its role in society. Annual selection of tools is at the very heart of strategical planning. In this case, FLM considers as key tools: *Long-term strategy & Yearly planning; Museum Manuals* made by the team (collections, research, visitor services, exhibitions, marketing); *Participatory museum management plans; Key projects or "Spearheads"* (which actually are: documentation of present day life, and critical pedagogy applied to visitor services).
  - In *Impacts*, we find the diversity of transformation impacts resulting from the museums work. They can be divided in four categories: *cultural, social, economic and environmental impacts*.
- In addition, and now referring to the name of this hybrid model, we realized that, if we put together the initials of each area by following their order of relevance, we get the word OPTI, which etymologically sounds like *optimum* – from the Latin *optimum* (best)<sup>13</sup> – so, that is how we found the most suitable name for our

<p><b>TABLE 1</b></p> <p><b>From Balance Scorecard to “OPTI Participatory Management Model” at Finnish Labour Museum</b></p>		
<p><b>BALANCE SCORECARD (BSC)</b>  <b>Strategy Management System consisting of:</b></p> <p>Mission + Vision + 4 Balanced Business Perspectives  <b>1990s</b></p>	<p><b>Finnish Labour Museum 1st BSC</b>  <b>Strategy Map consisting of:</b></p> <p>Mission + Vision + 4 Intertwined Perspectives adapted to Museum context  <b>2006</b></p>	<p><b>“OPTI Participatory Management Model”</b>  <b>Strategy Map consisting of:</b></p> <p>Mission + Vision + 4 New Intertwined Perspectives  <b>2016</b></p>
<p><b>FINANCIAL</b>                      Identification of relevant measures answering the question:  <i>How do we look to shareholders?</i></p>	<p><b>Impacts</b>                      Preserving Key Labour Heritage for future generations                      National self-understanding                      Critical reading of cultural heritage                      New knowledge production                      Address the audience &amp; increase visitors                      Develop Finlayson’s touristic dimension</p>	<p><b>Impacts</b>                      Cultural impacts                      Social impacts                      Economic impacts                      Environmental impacts</p>
<p><b>CUSTOMERS</b>                      Relevant measures answering the question:  <i>How do customers see us?</i></p>	<p><b>Customers</b>                      Positive experience for visitors, specially families                      Providing food for thought                      Cooperation with different players                      Touring exhibitions, online exhibitions                      Collections in use (loans at photos)                      Good information services</p>	<p><b>Tools</b>                      Long-term strategy and yearly annual planning                      Museum Manuals                      Participatory museum management                      Key projects or “spearheads”</p>
<p><b>INTERNAL PROCESSES</b>                      Relevant measures answering the question:  <i>How should we organize our work?</i></p>	<p><b>Processes</b>                      Quality, courage &amp; versatility                      Exhibitions, Education, Collections &amp; Research:                      • Collections well organised &amp; researched (Stop irresponsible growth)                      • Cooperation in collection policies &amp; shared responsibilities with other institutions                      • Debating social matters                      Visible, distinctive &amp; insightful marketing                      Museum shop &amp; space rental</p>	<p><b>People</b>                      Museum visitors                      Museum users                      Stakeholders                      Partners                      Volunteers                      Staff</p>
<p><b>LEARNING &amp; GROWTH</b>                      Relevant measures answering the question:  <i>How can we continue to improve, create value and innovate?</i></p>	<p><b>Learning &amp; Growth</b>                      Creative, learning &amp; bold atmosphere                      Developing the museum field &amp; strengthen own skills                      Strengthen research</p>	<p><b>Office</b>                      Economic sustainability                      Leadership                      Effective management                      Agile organizational culture</p>

TABLE 2

Good practices of Society Involvement at Museum management and daily life  
Finnish Labour Museum

ONE EXAMPLE OF SOCIETY'S DAILY INVOLVEMENT  
Museosakki (volunteering programme)

Created in 2013 from museum volunteering experiences since 1990

<p><b>The Group</b></p>	<p>24 Volunteers working over 2000 hours/year with almost all tasks of museum daily life. Volunteers are retired/unemployed men &amp; women in balanced proportions, between 60s and 70s, with diverse background: teachers, industrial workers, artists, historians, military... Some have university degree, others have vocational background. Volunteers take part in the staff events (Summer trip, Christmas parties). Museosakki is a success: it has helped FLM to solve many practical problems.</p>	
<p><b>The Motivations</b></p>	<p>Motivations are varied: to do something useful, to support FLM, to socialize, to learn, to have new challenges in their daily life (instead of nurture passivity, monotony...)</p>	
<p><b>Some examples of involvement at museum life</b></p>	<p><b>Collections</b> <b>What?</b> Updating the information in the museum database: flag collection <b>Who?</b> 2 volunteers during Autumn 2016. <b>Why?</b> Museum staff usually do not have time to update collections <b>Impacts:</b> Volunteers loved the experience and learned a lot about this historical heritage. Museum has its collections organized and updated so heritage is at hand.</p>	
	<p><b>Documentation</b> <b>What?</b> Documenting local labour heritage in rapid transformation: cardboard mill. <b>Who?</b> 4 volunteers documenting in Spring 2014 and editing until spring 2015. <b>Why?</b> Museum staff do not have time enough to document local heritage. Historical goods disappear without documentation of their relevance for social history. <b>Impacts:</b> People at the mill love it: their working place is now part of the FLM collection. Volunteers increase their knowledge about local heritage. Museum can research local heritage evolution along time and share it with society.</p>	
	<p><b>Exhibition</b> <b>What?</b> Celebrating anniversary of the 1<sup>st</sup> local community garden in Finland (Tampere, 1916) <b>Who?</b> Volunteers links to local collectives and neighborhoods. <b>Why?</b> They wanted to celebrate 100th anniversary. FLM welcome their ideas. <b>Impacts:</b> Exhibition improved self-confidence of gardeners and volunteers (who learned how skillful they already are in exhibition planning when compared with novices).</p>	

TWO EXAMPLES OF SOCIETY'S TEMPORARY INVOLVEMENT

Social Forum and Market of Possibilities

Organized once a year since 2006. Permanent home at FLM (with free and non-commercial premises)

<p><b>Social Forum</b></p>	<p><i>Social Forum</i> takes place at FLM rooms. It includes dozens of debates, lectures and panels about various themes like social justice, environment and global issues.</p>	
<p><b>Market of Possibilities</b></p>	<p><i>Market of Possibilities</i> takes place at FLM's yard. Different NGOs present their work, campaign and sell their products in a one-day in May. The whole program is decided by the NGOs and activists. Museum just adds some cultural content.</p>	

118 model. In fact, this is not a coincidence: OPTI was the result of a long process of sharing experiences, ideas and values to build an *optimum museology*, truly democratic, truly proactive and truly transformative.

To better understand how the FLM is applying each of these concepts to its departments (collections & research, visitor services, exhibitions, marketing & sales), with the mission of building a *Fair History*, we show one of the cards that was created for the 2016 planning and daily management (table 3).

Finally, during the third step of SoMus methodology, the FLM team decided that the symbolic object they wanted to use to represent their OPTI Model would be the steam engine flywheel that powered the Finlayson factory during the last decades of activity, and that currently integrates the permanent exhibition.

Table 4 presents the OPTI Model in its final form. It is created by fusing the OPTI model's basic structure and the anatomy of the last Finlayson steam engine wheel. It tells us the story about the power of an engine that was made and moved by people, to improve society's way of living. It tells us about the power of a living museology moved by collective energy.

### FINAL REFLECTIONS

Museums have evolved in the last decades from traditional, authoritative and inward looking institutions into more flexible, participatory and open projects becoming, in this way, soft power tools. However, the management of these cultural institutions remains mostly in an old *industrial status*. Management tools are mainly focused on developing private business and only secondarily on public sector and, as a consequence, many museums unsuccessfully waste resources on consultancy works that try to adapt popular management models to a

reality with its own different environment and challenges.

Museums are public organizations of a cultural nature dealing with memory, identity, sense of place and belonging and intercultural dialogue. These are dynamic processes of sense making related to the construction of inclusive and dialogical societies and their management models must fit to the complexity of their sociocultural work and daily processes. This dimension becomes more intense when we talk about museums acting in accordance with sociomuseological principles and methods: They walk hand in hand with society, they work as sociocultural networks embracing people, supporting collective and voluntary action, and nurturing activism related to the most diverse causes. In short, they are becoming key tools in the context of new developmental models, due to the fact that they deal with informal learning, helping to debate and define new values with our societies.

FLM acts according to these principles. It embraces the challenge of documenting, decoding and valuing the cultural history of labour in Finland, and also the mission of building a fair history, and this makes it a good practice example to a project like SoMus.

The SoMus Portuguese partner decided to create its first management model according to its priorities, ideas and current methods of collective working. For FLM the best option was to work on the most useful management tool they have been experiencing, bringing it up to the present to deal with their current challenge: to build a useful museology for and with contemporary society in a context of cultural participatory democracy. As a matter of fact, since 2006 FLM's team has been looking for a management model that could allow them to put essential things in one place, and BSC revealed to be a perfect solution.

**TABLE 3**  
**OPTI Cards for Collections & Research (2016 yearly planning)**  
**Finnish Labour Museum**

<b>INTERTWINED PERSPECTIVES</b>	<b>Strategical Aims 2016</b>	<b>Objectives 2016</b>	<b>Resources 2016</b>
<b>IMPACTS</b>	<p><i>Fair history:</i> Museum supports equal and solidarity society, sustainable development and human rights. Focus on:</p> <ul style="list-style-type: none"> <li>Distributing information and TAKO-actions*</li> <li>Concentrating acquisition on current themes: antiracism and changes in working life.</li> <li>Saving Labour Heritage with long-term commitment.</li> </ul> <p>Final Vision: to be the most interesting museum in Finland 2020.</p>	<ul style="list-style-type: none"> <li>16 articles published (magazines Paperillitto, Teima, Särmä)</li> <li>Publish the history of worker's association, 1 scientific journal, FLM customers magazine &amp; FLM blog</li> <li>91 000 units online (Totally in www.arjenhistoria.fi 178 000 objects, photos and books)</li> <li>320 000 visitors in web services</li> <li>Chairing TAKO-network, conference &amp; participation in 2 TAKO pools</li> <li>2 projects to increase collections</li> <li>20 presentations outside the museum</li> </ul>	<ul style="list-style-type: none"> <li>Magazines contribute: covered with profit (8 600 €)</li> <li>Workers' association: covered (20 000 €)</li> <li>Collection system fees from other institutions: covered (approx. 5000 €)</li> <li>TAKO-conference grant: covered (25 000 €)</li> <li>Other TAKO action and collecting is self-financed</li> </ul>
<b>TOOLS</b>	<p><i>Fair history:</i> ample museum services, open-hearted attitude and balanced vision of the past. Focus on:</p> <ul style="list-style-type: none"> <li>History project of co-op Tradeka**</li> <li>Development of collection management system and possible transfer of construction union's collections.</li> <li>Collection policy program &amp; research program updated (2014)</li> </ul>	<ul style="list-style-type: none"> <li>Tradeka project: 8 locations are documented, co-op objects are catalogued, two historical reports are written.</li> <li>Development of new Collection database system</li> <li>Transfer and cataloguing of construction union's collections</li> </ul>	<ul style="list-style-type: none"> <li>Tradeka grant: covered (61 000€)</li> <li>New Collection Management System is financed together with user organisations of previous E-Kuva program</li> <li>Constructor union's museum collection is transferred only if it is funded by the union</li> </ul>
<b>PEOPLE</b>	<p>Important People are: donors, partners in documentation, users of collections, colleagues, volunteers and staff. Focus on:</p> <ul style="list-style-type: none"> <li>Close co-operation with deaf communities</li> <li>Developing role of volunteers in collection activities</li> <li>Training plans for the permanent staff.</li> <li>Services for customers like selling photos.</li> </ul>	<ul style="list-style-type: none"> <li>Development of "index of participation"</li> <li>Voluntary work 3000hours</li> <li>Staff:</li> <li>100 days of education for the staff</li> <li>Developmental discussions</li> <li>Sick leaves average 7 days / year</li> <li>Average variation of monthly work hours in permanent staff 10h</li> <li>70 photos published</li> </ul>	<ul style="list-style-type: none"> <li>Salaries: covered (approx. 800 000 €)</li> <li>Other costs related to staff: covered (45 000 €) (e.g. education, refreshment, volunteers)</li> <li>Deaf association for their collections and exhibition: covered (approx. 37 000€)</li> <li>Photo sales: approx. 1000€</li> <li>Grants for the university trainees: half-covered</li> </ul>
<b>OFFICE</b>	<p>Organizational culture and building premises focused on:</p> <ul style="list-style-type: none"> <li>Reorganization of collection stores, sorting out old donations and cataloguing objects</li> <li>Hopefully, donation of museum collection from Construction Trade Union.</li> <li>Renewal of safety systems.</li> <li>Definition of: Program of occupational safety, yearly timetable (clock), meeting procedures and initiative.</li> </ul>	<ul style="list-style-type: none"> <li>Reviewing/actualizing of old donations</li> <li>Re-organization of storages: especially K2 &amp; Vöijävi</li> <li>Organising material from Construction Trade Union</li> <li>Creation of yearly timetable and program of occupational safety</li> <li>36 000 objects and 57 000 photos in database</li> </ul>	<ul style="list-style-type: none"> <li>Special grants from Foundations: Rihti (25 000 €) and STS (15 000 €)</li> <li>Possible project with Construction Trade Union: not covered for the moment</li> <li>Volunteers important to achieve cataloguing objective</li> <li>Lenin database conversion as own work: not covered</li> <li>Grant from Palikkaajasaatiö Foundation for new safety systems: covered (30 000€)</li> <li>Collection's expenses (annual budget 29 000 €)</li> <li>Expenses of whole organization (1,760,000 €)</li> </ul>

\*TAKO – network of museum professionals for the purpose of coordinating collaboration in matters related to acquisitions, documentation and collections

\*\* Co-operative Tradeka - consumer co-operative founded in Finland in the year 1917.

With its experience, FLM affirms the possibility of adapting management models from other sectors to cultural institutions, even in those cases where a participatory management is needed. This possibility entails for the museum team a high level of knowledge about the institution – its mission and people –, a good selection of the management tools to be adapted, and also a high degree of sensitivity to combine all these matters with the sustainability of the institution from different points of view.

The OPTI Model is the result of ten years of experience and progressive adaption of the BSC model to cultural institutions, and FLM has been the laboratory where it has been successfully adapted. It represents a step forward from a classic model to a reactive model that can open up new ways of management according to current times and current cultural challenges. Like other participatory tools, OPTI should be a dynamic and evolutionary model that will continue to be improved every year and with each experience.

SoMus is now midway in its journey. Two of our four partners (one Nordic and another Mediterranean) have already defined their participatory management models and, according to SoMus objectives, they are models to be used not only in other museums, but also in other kinds of cultural institutions.

Reflecting on their specificities and on their usefulness, we found some common relevancies. Not by chance, both models place people at the centre of every process, irrespective of the fact of having three persons as a fixed team (like MuT) or thirty (like FLM). In fact, for these museums the concept of team has now new and larger meanings because they are nurturing sociocultural networking to build their daily life. They know the key question is not how much you make part of

the process, but *how* you do it (Bordenave 1983:23).

These museums are known by their impacts at different levels, and by the way they are contributing to value creation through culture at different scales and levels. And these are only some of the most evident effects of museum networking with society. Not by chance both models include four intertwined worlds, allowing museum to create new and necessary balances for/with society: the Portuguese partner identifies four layers of participation according to its nature, intensity and the profile of the people involved (Sancho Querol & Sancho 2015), and the Finnish partner works with four practical perspectives applied to each museum department, linking them through the museum mission.

As non-hegemonic places of knowledge production, these museums are exploring the emancipatory potentialities of paradigmatic transition towards a participatory museology. Along the way they have learnt to collectively use their most prominent power: one of construction of meanings and values (Castells 2011:779). OPTI will be applied at FLM from now on and in 2018 a new evaluation will be made. We hope there will be new matters to improve and new challenges to face. Maybe you want to help us by testing it in your museum?

## NOTES

1. This article is a product of the post-doctoral project of the first author “Society in the Museum: study on cultural participation in European local museums” (SoMus), which is co-financed by the European Social Fund through the Operational Programme of Human Potential, and by National Funds through the Foundation for Science and Technology, Portugal, in the context of the grant reference SFRH/BPD/95214/2013. The article is

**TABLE 4**  
**OPTI Model applied to Finnish Labour Museum**



<p><b>IMPACTS</b></p> <ul style="list-style-type: none"> <li>- CULTURAL IMPACTS</li> <li>- SOCIAL IMPACTS</li> <li>- ECONOMIC IMPACTS</li> <li>- ENVIRONMENTAL IMPACTS</li> </ul>
<p><b>TOOLS</b></p> <ul style="list-style-type: none"> <li>- LONG-TERM STRATEGY AND YEARLY ANNUAL PLANNING</li> <li>- MUSEUM MANUALS</li> <li>- PARTICIPATORY MUSEUM MANAGEMENT</li> <li>- KEY PROJECTS OR "SPEARHEADS"</li> </ul>
<p><b>PEOPLE</b></p> <ul style="list-style-type: none"> <li>- MUSEUM VISITORS</li> <li>- MUSEUM USERS</li> <li>- STAKEHOLDERS</li> <li>- PARTNERS</li> <li>- VOLUNTEERS</li> <li>- STAFF</li> </ul>
<p><b>OFFICE</b></p> <ul style="list-style-type: none"> <li>- ECONOMIC SUSTAINABILITY</li> <li>- LEADERSHIP</li> <li>- EFFECTIVE MANAGEMENT</li> <li>- AGILE ORGANIZATIONAL CULTURE</li> </ul>

© The Finnish Labour Museum & Lorena Sancho Querol. Design: André Queda (2016)

written in collaboration with the director and the historian of the Finnish Labour Museum, who represents the whole team of the museum and helped to make the SoMus research process real. SoMus is a step forward in a path of participatory emerging cultural directions, that the first author of this article began in 2007 with a PhD thesis on a participatory inventory of intangible cultural heritage (Sancho go Querol 2016), and that now, with SoMus, and through the hands of new partners and experiences, is incrementally maturing.

2. Inspired by the aims of the Work Programme

(HORIZON-2020), SoMus combines Social Sciences and Humanities with Responsible Research and Innovation (RRI-SSH) to build useful management tools for museums and other cultural institutions. More information about RRI at: <https://www.rri-tools.eu/>

3. This concept is being defined on the SoMus webpage at: [http://www.ces.uc.pt/projectos/somus/index.php?id=12417&id\\_lingua=1&pag=12428](http://www.ces.uc.pt/projectos/somus/index.php?id=12417&id_lingua=1&pag=12428)
4. SoMus network also includes academic partners, critical friends, volunteers and PhD Students. Network's partners and structure are available

- at the SoMus webpage: [http://www.ces.uc.pt/projectos/somus/index.php?id=12417&id\\_lingua=1&pag=12430](http://www.ces.uc.pt/projectos/somus/index.php?id=12417&id_lingua=1&pag=12430)
5. MuT webpage is available at: <http://www.museu-sbras.com/indexi.html>
  6. FLM webpage is available at: <http://www.werstas.fi/?lang=en>
  7. Most of the Finnish museums are run either by public bodies or foundations, so FLM's case is quite unusual. At FLM, member organizations appoint the board of the institution, support and use the museum as their historical experts. FLM is mainly funded by the Ministry of Culture and City of Tampere with active fundraising, projects and business proceeds.
  8. BSC is a strategic management system used in the business world. It allows a balanced and demanding organizational process through a regular evaluation and, consequently, the possibility of improving the project as often as needed. Its basic structure is composed of four perspectives (*Learning & Growth, Internal Processes, Customer & Financial*) together with their strategic aims, objectives and resources. These perspectives are deeply intertwined between them through a project Vision. This structure is applied to each department of the institution, by creating their own BSC Card. As a result we get a strategy whose daily exercise gives us a balanced and demanding management.
  9. EFQM characteristics are available at: [www.efqm.org](http://www.efqm.org)
  10. CAF characteristics area available at: [www.eipa.eu/caf/](http://www.eipa.eu/caf/)
  11. Deeper information about this model at: [http://www.nba.fi/en/development/museum\\_assessment\\_m](http://www.nba.fi/en/development/museum_assessment_m)
  12. In 2016 the museum had a staff of 17 people with permanent contracts, 3-6 project researchers, some trainees, civil servants and unemployed persons in assisting task fulfilment. Full-time staff usually varies between 25 to 30 persons. In addition, a dozen university students

work as guides especially at weekends and in summertime.

13. Etymology of "optimum" according to *Online Etymology Dictionary*: [http://www.etymonline.com/index.php?allowed\\_in\\_frame=0&search=optimum](http://www.etymonline.com/index.php?allowed_in_frame=0&search=optimum)

## LITERATURE

- Ahola, Teemu, Ulla Jaskari, Kalle Kallio *et al.* 2013. *Reilusti historiaa. Työväenmuseo Werstaan vaikuttavuus*. Tampere: Työväenmuseo Werstas.
- Bordenave, Juan 1983. *O que é participação? Coleção primeiros passos*. São Paulo: Editora Brasiliense.
- Canclini, Nestor Garcia 2003. *Culturas Híbridas. Estratégias para entrar e sair da modernidade*. São Paulo: Eadusp, 2. edition.
- Castells, Manuel 2011. "A network theory of power". *International Journal of Communication* 5, 773–787.
- Dessein, Joost, Katriina Soini, Graham Fairclough & Lummina Horlings 2015. *Culture in, for and as Sustainable Development. Conclusions from the Cost Action IS1007 Investigating Cultural Sustainability*. Jyväskylä: Jyväskylä University Press & European Cooperation in Science and Technology.
- Eenilä, Jukka 1965. "Museo ja muuttava yhteiskunta." In Risto Laine (ed.) *Vanhalinna I*. Turku: Vanhalinnan museon ystävät r.y., 6–10.
- Haapala, Pertti 2011. "Tampere. A history of industrial society." In Miia Hinnerichsen (ed.). *Reusing the Industrial Past by the Tammerkoski Rapids. Discussion on the Value of Industrial Heritage*. Tampere: City of Tampere, Museum Services, Pirkanmaa Provincial Museum, 9–19.
- Jutikkala, Eino 1979. *Tampereen historia III. Vuodesta 1905 vuoteen 1945*. Tampere: City of Tampere.
- Kallio, Kalle 2010. "Labour heritage and identities in Tampere". In Keijo Rantanen (ed.) *Living Industrial Past. Perspectives to industrial history in the Tampere region*. Tampere: Museum Centre

- Vapriikki and the Finnish Labour Museum Werstas, 110–135.
- Kallio, Kalle 2007. "Museon yhteiskunnalliset tavoitteet." *Museologia tänään*. Suomen museoliitto, 105–131.
- Kaplan, Robert S. & David P. Norton 2000. *The Strategy-Focused Organization. How Balanced Scorecard Companies Thrive in the New Business Environment*. Boston, MA: Harvard Business School Press.
- Koivisto Tuomo 1999. *Työt ja tekijät. Näkökulmia tamperelaiseen ammatilliseen työväenliikkeeseen 1800-luvulta 2000-luvulle*. Tampere: SAK, Tampereen Paikallisjärjestö ry.
- Peltola, Jarmo 2014. "Structural change and changing lifestyle in Tampere, 1945–2010." In Mari Lind, Kimmo Antila & Antti Liuttunen (eds.). *Tampere – City of the Rapids*. Tampere: Tampere Museums' Publications 122, 192–207.
- Rasila, Viljo 1984. *Tampereen historia II. 1840-luvulta vuoteen 1905*. Tampere: City of Tampere.
- Sancho Querol, Lorena 2016. *El Patrimonio Cultural Inmaterial y la Sociomuseologia. Un estudio sobre inventarios*. Cadernos de Sociomuseologia, Coleção Série Estudos PósGraduados, Nº 1 (nove série).
- Sancho Querol, Lorena & Emanuel Sancho 2015. "How can museums contribute to social and cultural change?" In Jacob T. Jensen & Ida Brændholt Lundgaard (eds.). *Museums. Citizens and sustainable solutions*. Denmark: Danish Agency for Culture, 212–231. Available at: <http://www.youpublisher.com/p/1168529/>
- Santos, Boaventura Sousa 2007. "Beyond abyssal thinking. From global lines to ecologies of knowledges". *Review XXX* 1, 458–9.
- Simon, Nina, 2010. *The Participatory Museum*. Santa Cruz: Museum 2.0.
- Työväenmuseo Werstas, 2006. *Kokoelmapoliittinen ohjelma*. Collections' policy internal document, available at: [http://www.tkm.fi/kokoelmapoliittikat/Werstas\\_KPO\\_2006.pdf](http://www.tkm.fi/kokoelmapoliittikat/Werstas_KPO_2006.pdf)
- UNESCO, 2001. *Universal Declaration of Cultural Diversity*.
- UNESCO, 2003. *Convention for the Safeguarding of Intangible Cultural Heritage*.
- UNESCO, 2015. *UNESCO's Work on Culture and Sustainable Development. Evaluation of a Policy Theme*.
- Weil, Stephen E. 2002. *Making Museums Matter*. Washington: Smithsonian Institution.
- Werstaan tulevaisuusohjelma 15.12.2006. Unpublished strategy document from the archives of The Finnish Labour Museum.
- Lorena Sancho Querol, Ph.D., Researcher*  
[lorenaquerol@gmail.com](mailto:lorenaquerol@gmail.com)
- Centre for Social Studies*  
*University of Coimbra*  
*Colégio de S. Jerónimo 3087*  
*PT-3001-410 Coimbra, Portugal*  
<http://www.ces.uc.pt/en/ces/pessoas/investigadoras-es/lorena-sancho-querol>
- Kalle Kallio, Director*  
[kalle.kallio@tyovaenmuseo.fi](mailto:kalle.kallio@tyovaenmuseo.fi)
- Finnish Labour Museum Werstas*  
*Väinö Linnan aukio 8*  
*FI-33210 Tampere, Finland*  
<http://www.tyovaenmuseo.fi>,  
<http://www.kallekallio.fi>
- Linda Heinonen, MA in History, Researcher*  
[linda.heinonen@tyovaenmuseo.fi](mailto:linda.heinonen@tyovaenmuseo.fi)
- Finnish Labour Museum Werstas*  
*Väinö Linnan aukio 8*  
*FI-33210 Tampere, Finland*