



KAMU

ESPOO
CITY
MUSEUM

Digital policy checklist

A tool for drawing up guidelines for your museum's digital services

A large, solid orange shape in the top-left corner of the page, with a wavy, organic edge that curves towards the center.

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FOR THE READER

This digital policy checklist supports the strategic development of a museum's digital services. It is a tool that experts working with digital services can use when preparing their own digital policies or other, similar policies. The museum's digital policy aims to act as a handbook that guides the work carried out in the context of digital services and is visible to the audience as a harmonious, interesting, accessible and sustainable set of digital services that it helps create. The digital policy checklist continues the path paved by the Collection policy checklist and the Meaningful audience engagement checklist as a joint tool for museums with which a museum can create its own guidelines for the use and development of digital services.

The operating model presented in the checklist is based on the idea that work with digital services is more sustainable and effective when it is systematic, goal-oriented and in line with the museum's strategy. This goal is supported if the museum's staff, audience and partners are involved in preparing the digital policy as extensively as possible. This idea has previously also been applied in KAMU's Meaningful audience engagement checklist. The digital policy drafting project is valuable in itself. It improves participants' knowledge and understanding of digital services.

Museums are different, which is why policies on digital services can be drawn up in different ways and from different starting points. Guidelines do not have to be in the form of a digital policy, but this checklist can be used as a basis for planning and developing a wide range of work on digital services. Since a single document cannot cover all aspects of digitalisation, the preparation of guidelines always requires museums to carry out their own investigation and interpretation work. The checklist can be utilised when applicable or it can be supplemented with items relevant for the museum in question.

This checklist was created as part of the digital policy project of KAMU Espoo City Museum, and we would like to thank the Finnish Heritage Agency for funding the project. In addition to the checklist, the project created for KAMU its own digital policy. During the project, an online survey was carried out to determine the use and management methods of museums' digital services and museums' wishes concerning this checklist. The authors also met with representatives of several museums and received information about the museums' digital services. We thank everyone for their contributions to the project! We hope that this project will contribute to increasing cooperation between museums in terms of digital services.

The checklist consists of text as well as further questions that will help the reader contemplate the different themes from a variety of perspectives. A deeper look into each topic is facilitated by KAMU's examples of tested and successful ways of developing the digital policy. Hopefully, these tried and tested practices will inspire you to create a digital policy that is best suited for the use of your museum. In addition to the checklist, the KAMU website (www.espoonkaupunginmuseo.fi) also has practical tools for creating a digital policy.

Chapter one guides you to define how the digital services will support the achievement of the museum's goals and what the museum's digital vision is like. Chapter two helps your museum consider how to define its digital services. Chapter three explains the values and operating principles that guide digital policies. Chapter four focuses on assessing the current state of the museum's digital services. Chapter five describes the means and processes of preparing a digital service, and chapter six provides a customisable template for the structure of a digital policy. A list of links and additional information on the topic is included at the end of the publication.

In September 2024, Espoo
KAMU staff



1 | PURPOSE AND OBJECTIVES OF THE DIGITAL POLICY

Museums are different from each other and their degree of digitalisation varies. However, digitalisation is an integral part of the activities of all museums, and it is not possible or even necessary to separate it from other activities. Digital services must form a coherent entity with the museum's other services and support the museum's goals. The museum's vision and strategy guide digital services the same way they guide other activities. Management of digital services requires special equipment and expertise. Therefore, the use and development of digital services may need to be guided by a separate digital policy. The purpose of a digital policy is to describe the measures with which the digital services will support the achievement of the museum's goals.

Museums can independently determine what the objectives of their digital policies are and which issues they want their policies to solve. For example, a digital policy can serve as a guide to the creation of sustainable and socially effective digital services or clarify the development process of new digital services and the management of existing services. The digital policy can define the responsibilities and obligations of the actors and describe the processes for the development and maintenance of digital services. The digital policy can also provide practical tools for the development of digital services, as well as guidance for the purposeful, responsible and resource-smart use of digital services and the development of indicators and statistics. The digital policy can create a strong and flexible base that enables rapid changes as the digital operating environment evolves.

When planning the purpose and objectives of the digital policy, it may be necessary to clarify why digital services are provided and what they are intended to achieve. Establishing a digital vision can help with this. The digital vision is a clear description of what the museum's digital services are like in their target state, how the museum manages them and by when the target is to be achieved.

How do digital services help achieve the museum's goals? What are the objectives of the digital policy? What is the target image or digital vision of digital services? What kinds of issues do we want to solve with our digital policy?

2 | DEFINING DIGITAL SERVICES

The questions and examples presented in this chapter can be used to discuss how your museum defines its digital services, what the purpose of digital services is and how digital services are visible to the public and staff. Hearing the term “digital services” evokes a wide range of different images in people’s minds, which is why you should make an effort to define what your museum means when it talks about digital services. You can use the ready-made glossaries listed at the end of the checklist to help you define your digital service. However, it should be noted that glossaries vary in content and may contradict each other.

A digital policy is drawn up either to cover all the services of the museum that can be classified as digital or only some of them, such as online services provided for the public, exhibitions’ digital elements or digitisation. It also determines whether the term “digital service” refers to the technical implementation or content creation of a digital service, or both.

What digital services does the digital policy apply to and what does the term “digital service” mean? Is the term “digital services” used to refer to all digital services used and provided by the museum or only, for example, digital services provided to the public or digitisation? Are all digital services under the museum’s control or are they dependent on the decision-making of a background organisation or system supplier? What is the role of digital services in relation to the overall services of the museum? What kinds of terms are used at the museum when talking about digital services and what do they mean? What different dimensions do the digital services contain and which of these dimensions does the digital policy concern (e.g. technology, content creation, etc.)?

Defining digital services at KAMU

In KAMU's digital policy, digital services refer to all of the museum's digital services. Expansive digital services, such as virtual exhibitions or mobile guide platforms, can consist of many different contents that increase or change at certain intervals. Updating the contents is part of the implementation and maintenance phases of the lifecycle of a digital service. More detailed guidelines for contents can be found in KAMU's other policies and guidelines, such as the collection policy, audience engagement policy, research and publication policy and the exhibition process descriptions.

The digital policy project started its survey of digital services by collecting data about the digital services in an Excel table. All digital services, their purpose, responsible persons, users and other relevant data were recorded in the table. This list was discussed in a staff workshop where the number of existing digital services was considered to be surprisingly high. The workshop explored the current state of digital services and the staff's thoughts on the digital services of the future.

In the digital policy, digital services are divided into services provided to the public, internal services available for use within the museum, and digital support structures. **Digital services provided to the public** include things such as digital elements of physical exhibitions, online exhibitions, the museum's website, digital educational materials and video materials. **Internal digital services used within the museum** refer to services used by the museum staff that are only used in KAMU and that are managed by the museum. Internal digital services used within the museum include, for example, a collection management system and the digitisation of collections. **Digital support structures** are tools and services provided by the City of Espoo to KAMU, the maintenance and lifecycle of which is the responsibility of the City's Information Management department. Digital support structures include, for example, digital devices, telecommunications links, Microsoft Office software, email, employee time tracking and intranet.

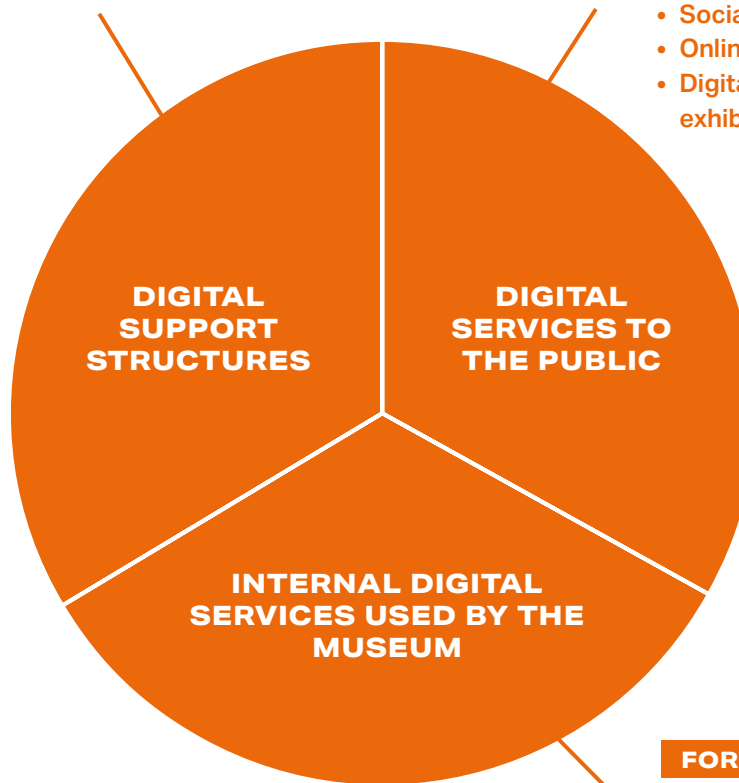
KAMU's digital policy mainly applies to the digital services provided by KAMU to the public and the internal digital services used within the museum. Their lifecycle is the responsibility of KAMU. The lifecycle of digital support structures is the responsibility of the city's Information Management, and KAMU's role in managing them is minor. All digital services used in KAMU must be managed in accordance with the regulations and instructions of the city.

FOR EXAMPLE:

- Office software (e.g. Office 365)
- Intranet and tools
- Telecommunications links
- Digital tools (e.g. computers, telephones)

FOR EXAMPLE:

- Virtual museums and exhibitions
- Mobile guides
- Finna
- Materials for schools
- Website
- Videos on YouTube
- Social media contents
- Online shop
- Digital elements of physical exhibitions



KAMU's digital services

FOR EXAMPLE:

- Collection management system
- Visitor counters
- Digitization
- Checkout services and reservations

3 | VALUES AND OPERATING PRINCIPLES

The questions presented in this chapter can be used to define the factors guiding digital services that create the basis for the overall digital policy. The digital policy follows valid legislation, the museum's internal policies and the guidelines of the museum's background organisation, such as the municipality or a foundation. The digital policy also defines other principles to be followed and explains how the values and operating principles are reflected in the goals and measures of digital services. When surveying the guiding factors, it is good to consider which things should be followed primarily, which things are relevant and which things the resources can cover. The digital policy will be updated to reflect any changes in legislation or guidelines.

How do the legislation and guidelines concerning museums affect your museum's digital services?

For example, the Museums Act and Decree, Act on Cultural Activities in Local Government, Act on the Provision of Digital Services, Personal Data Act, Copyright Act, Museum Policy Programme of the Ministry of Education and Culture.

Which of the written guidelines or strategies guiding your museum also guide the digital services?

For example, the strategy of the city, municipality or association maintaining the museum, Information Management's policies, the museum's own vision, mission and strategy, the museum's rules, collection policy, audience work policy, research and publishing policy, areas of responsibility and agreements between regional and national museum work.

What other principles, programmes or values are applied in the museum's digital services?

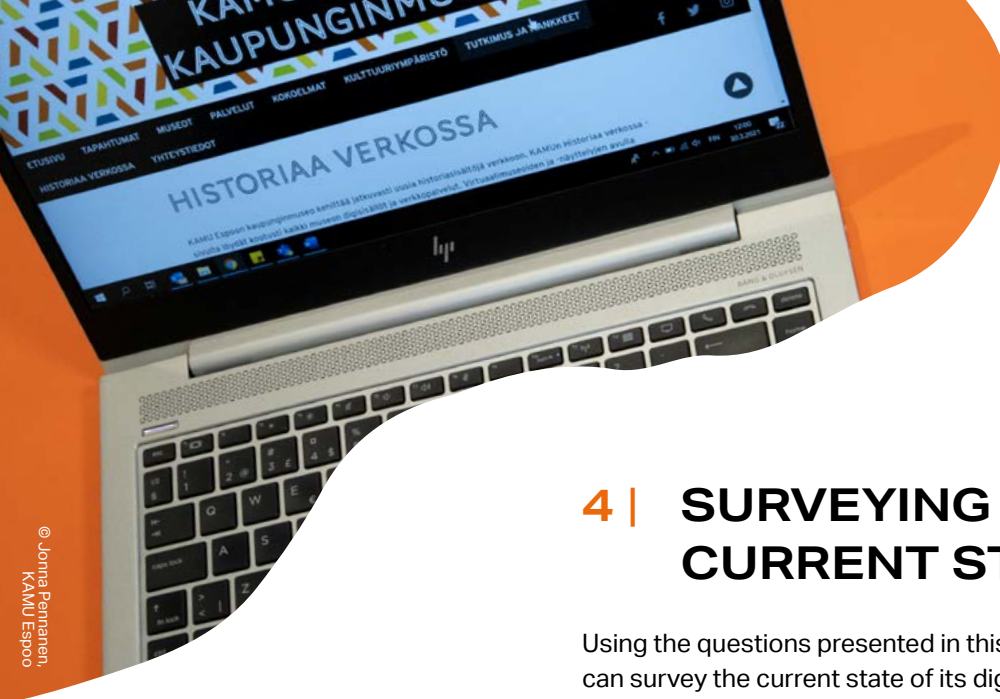
For example, the UN 2030 Agenda for Sustainable Development, fair data economy, open access to information, user orientation, accessibility, community spirit, courage, diversity, inclusion.

Principles guiding KAMU's digital policy

The graph below depicts the factors guiding KAMU's digital policy. In its digital services, KAMU complies with the valid legislation, of which the Museum Act and Decree, the Act on Cultural Activities in Local Government, the Act on the Provision of Digital Services and accessibility requirements, and the Copyright Act are presented as key elements in the graph. Guidelines concerning museums refer to the Museum Policy Programme of the Ministry of Education and Culture. KAMU is part of the City of Espoo, which means that its operations are defined by the City's strategy The Espoo Story, the CultureEspoo 2030 programme of the City's Cultural Services and the digitalisation plan, as well as the City's Information Management's guidelines, such as the digital vision and digital story and the management model for data products. KAMU also has its own vision and mission, as well as other documents guiding its operations, such as a collection policy, an audience engagement policy, a research and publication policy and communications guidelines. The digital policy must be compatible with all these policies and complement the resulting entity. In addition to the above, KAMU's digital policy follows certain principles and guidelines, of which Agenda 2030, fair data economy and open access to information are highlighted in the graph.



Factors guiding KAMU's digital policy



4 | SURVEYING SERVICES' CURRENT STATE

Using the questions presented in this chapter, your museum can survey the current state of its digital services. The questions are divided into four areas: digital services, the management process, users and the operating environment. The field of digital services is constantly changing and the pace of change can be rapid. Examining the current state of the services can help understand the related strengths, weaknesses, opportunities and threats, and thus serve as a basis for the flexible development of services. A useful tool, in addition to the questions, is the Digital Strategy Canvas model (<https://www.cogapp.com/r-d/digital-strategy>), some parts of which are also applied in this chapter. The model helps its users perceive the complex entity required for producing digital services as well as the environment in which the digital services are produced.

Digital services

What digital services do we offer? Are they technically up to date? Is their content up to date? What are the opportunities and risks related to our digital services? Do the digital services support the organisation's goals?

Management process

Who are the responsible persons? What is the division of labour? How well does the persons competence meet the needs? How is the competence of the persons maintained and developed? How are new digital services being developed? How are digital services managed and maintained? What kind of processes are related to digital services? Who makes the decisions about digital services? How is the success of digital services measured? What are the profits and expenses of digital services? What are the key cooperation bodies?

Users

How high is the number of users? Where do users come from? Who are the users? What does the user get from the service? What kinds of experiences do users have with the digital services? How do we support customer relationships? How do we acquire and retain customers?

Operating environment

How do cultural and local trends affect the demand for digital services/our organisation/our customers? What are the main technologies used? How will the technologies evolve in the future? Which other bodies offer similar digital services? How do our services compare to those offered by others?



Areas of surveying the current situation



5 | MAKING DIGITAL POLICY

This chapter is intended to help you plan your digital policy project. The digital policy project will utilise your museum's own project model. If your museum does not yet have a project model in use, it is advisable to familiarise yourself with different models and choose the most suitable one.

The questions presented here can be used to consider how the digital policy will be implemented. The means will be selected, for example, according to your museum's needs, resources and size. It is recommended that the museum's staff, as well as representatives of the public and other stakeholders, be involved in the planning of the digital policy so that a comprehensive view of the various areas of digital services can be achieved. If the museum or its background organisation has its own information management unit, it is important to cooperate with it.

Responsibilities and resources

Who are appointed as the responsible person(s) for the digital policy project? Who does the background work and plans the work phases? Who will write the final digital policy? How much time is allocated to the creation of the digital policy? How are work phases scheduled? What are the human and financial resources available? What kind of information is needed for the digital policy? From whom can information be obtained?

Working methods of project team

What kinds of tools do we use in the digital policy work (e.g. software, files)? How is the progress of the project monitored? How is information about the project communicated to others? How is the project documented? Where do we store the data collected in the project and who should have access to the data?

Involvement of the public, staff and stakeholders

Which groups do we want to involve in the digital policy work? How can the cooperation bodies be reached? How will we ensure that everyone participating in the project is heard? How do we utilise information from the public, staff and stakeholders? How do we communicate about the digital policy project to different parties? How do we engage different groups in the digital policy project? What means do we use in the participation? Methods such as workshops, interviews, surveys, experiments, community meetings, cooperation with educational institutions and hackathons can be utilised in the work.



TRIED AND TESTED PRACTICE:

Community-oriented project at KAMU

KAMU's digital policy was drawn up in a collaborative project, in which KAMU's staff, representatives of the public and stakeholders participated in the planning of the museum's digital policy and the selection of priorities. During the project, things such as workshops, interviews and electronic surveys were held to find out how staff, the public and stakeholders view the digital services.

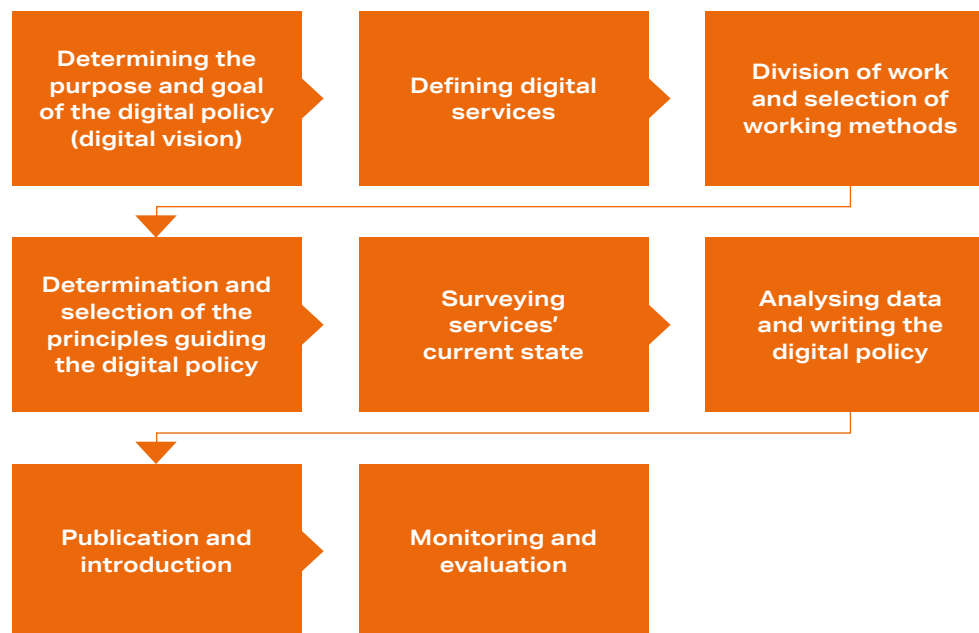
Two workshops were organised for the museum's staff. The purpose of the first workshop was to determine the current state of digital services and staff's thoughts on future digital services. During the workshop, the participants were divided into small groups to discuss four different tasks. The groups documented their answers and the project team used the answers to help formulate digital policy guidelines. The theme of the second staff workshop was KAMU's digital vision. The workshop examined KAMU's vision and discussed how it can be implemented using digital services. On the basis of the ideas of the workshop, a digital vision was formed for KAMU. The aim is to implement the vision with the measures presented in the digital policy. An electronic survey was held for the museum guides, through which they answered the questions asked in the workshop.

The public's opinions on museums' digital services was assessed through an electronic survey and a community meeting. Among other things, the survey investigated what kinds of museums' digital services the respondents knew and what kinds of digital services they would like to use in the future. A new remote guided tour of the museum's virtual exhibition was tested in cooperation with a group of the museum's customers. The meeting provided useful information on one digital service and experience on how to involve representatives of the public in the planning of digital services.

Stakeholders' opinions were explored by meeting with representatives of museums and other cooperation bodies and holding an electronic survey for museums. The meetings with museums and the survey held for them were a way to assess the use and management methods of digital services. The survey also examined what kind of support museums need for managing digital services from, for example, this operating ►

model. The museums were informed about the project by the Museoposti email list, and the project was presented to museums and other stakeholders at several events.

After the digital policy project, the development of digital services will be continued at KAMU in a systematic and user-oriented manner. Collection, compilation of statistics of and analysis of user data will be invested in more than before so that the data can be utilised in the development of digital services. Digital services will be developed to be interactive and encourage dialogue. An example of new forms of cooperation with the audience are Game Lab events, where upper secondary school students and game developers jointly brainstorm digital services from the contents provided by the museum. Staff are encouraged to try out and innovate new services by, for example, organising innovation workshops. KAMU's cooperation with industry networks and other museums is being deepened further.



Phases of the digital policy project

6 | CONTENT OF THE DIGITAL POLICY

This chapter presents an example of the content and structure of the digital policy document. Your museum must select the sections that are suitable for it and modify them to suit it, taking into account the relevant objectives, resources and other pre-conditions. The content of each section is described through a set of questions, and the work of building the sections can be started by answering the questions. Content can be compiled using collaborative methods with staff, the public or stakeholders.

Introduction

Why is the museum developing a digital policy? Which activities are guided by the digital policy? How is the digital policy used in the museum? What is the period of time for which the digital policy will be made? How will it be reflected in the daily lives of the employees? How will it be visible to the museum's audiences, partners and decision-makers? Will it be published in full or partly, and how? How concrete will the guidelines be? Which issues will be excluded? Which matters will be revisited later?

Digital vision and digital policy objectives

What impacts do we want to achieve with digital services? What is the museum's digital vision, i.e. goal, towards which we strive with the digital policy? What kind of digital services do we want to create and by what means? By when do we want to reach this goal?

Principles of digital services

Which laws, regulations, values, strategies, guidelines and rules guide the digital policy? How are things such as accessibility, sustainable development and open access to materials and information taken into account? What other principles are set for digital services? How are the principles reflected in the digital services?

Digital services and their users

What kinds of digital services does the museum use and produce? Which digital services does the digital policy concern? Is it necessary to create categories for different digital services? Who is the digital services' intended audience?

Identification and responsibilities of operators

Who makes the decisions? Which entities are involved in the different phases of the digital service lifecycle? What are the responsibilities of each operator? What roles are involved in the digital service lifecycle (e.g. product owner, administrators, technical support person)? Who handles the technology, content, maintenance and advising of the service?

Digital service's lifecycle and work phases

What are the phases of the digital service lifecycle? What are the work phases for each phase? Are the lifecycle stages the same for all digital services or do they vary according to aspects such as the type or size of the digital service?



An example of the phases of a digital service lifecycle

Digital services as a whole

What kind of entity do digital services form? Is there a specific method used in the development of digital services (e.g. service design methods)? How does the digital service entity complement the organisation's overall service entity? Who are the key cooperation bodies? What kind of cooperation does the organisation carry out with other parties? How is the up-to-date nature of digital services ensured? How is the digital competence of the staff ensured? How is customer data collected? How to encourage experimentation and innovation? What kinds of resources are available?



Criteria/checklist for a good digital service

What requirements do we set for a good digital service? What should digital service developers take into account? How are the digital policy objectives and preconditions reflected in an individual digital service?

IS A GOOD DIGITAL SERVICE, FOR EXAMPLE:

- | | |
|--|--|
| ☐ Designed as part of an ensemble | ☐ Interactive |
| ☐ Designed in a user experience-oriented manner | ☐ Contributing to the museum's impact goals |
| ☐ Designed for a specific target group | ☐ Technically up to date |
| ☐ Experience-oriented | ☐ Implemented with carefully chosen partners |
| ☐ Sustainable | ☐ Something that creates additional value and implements the museum's vision, mission and values? |
| ☐ Accessible | |
| ☐ User-friendly | |

Introduction, assessment and updating of digital policy

How will the digital policy be introduced? How are others informed about the digital policy? How is the digital policy used in staff onboarding? When will the digital policy be reviewed and updated? What indicators are used to monitor the success of the digital policy and the processes of digital services? Where can information be obtained? What tools will be used for monitoring? For whom is this information produced and why?

7 | FURTHER READING

Creation of digital policy

Digital Strategy for Museums Guide. Morrison, Alex, 2019.

<https://www.cogapp.com/r-d/digital-strategy>

Building a Robust Museum Digital Content Strategy. Deakin, Tim, 2023.

<https://www.museumnext.com/article/how-can-your-museum-develop-an-integrated-digital-content-strategy-that-commands-attention/>

Digital Strategy Development. ICOM.

<https://cidoc.mini.icom.museum/working-groups/digital-strategy-development/>

Terminology

Finto.fi. Vocabularies and ontologies (e.g. YSO or SIZE).

<https://finto.fi/en/>

TEPA Term Bank. Sanastokeskus, 2024.

<https://termipankki.fi/tepa/en/>

YLEn Digitreenien digisanasto. (Finnish Broadcasting Company's glossary of digital terms, in Finnish) Yleisradio, 2019.

<https://yle.fi/aihe/artikkeli/2019/03/25/>

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Policies and reports

KAMU's digital policy. KAMU Espoo City Museum, 2024.

www.espoonkaupunginmuseo.fi

Kohti parempia digisisältöjä -hankkeen loppuraportti ja kyselyraportti. (Final report and survey report of the project Towards Better Digital Content, in Finnish) Levonen, Senna, 2021.

<https://www.digisarka.fi/esitelmat-ja-julkaisut/museon-julkaisuja/>

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<https://github.com/thewarholmuseum/digital-strategy/blob/master/index.md>

Digital Strategy 2022 to 2024: Reach and Impact. Science Museum Group, 2022.
<https://www.sciencemuseumgroup.org.uk/about-us/policies-and-reports/digital-strategy-2022-2024-reach-and-impact>

Digital Strategy. Royal BC Museum, 2016.
<https://royalbcmuseum.bc.ca/media/5299>

Sustainable development

Kestävän kehityksen tavoitteet, Agenda 2030, Suomen YK-liitto, 2017 (Goals for sustainable development, Agenda 2030, the UN Association of Finland, in Finnish)
<https://www.ykliitto.fi/julkaisut/kestavan-kehityksen-tavoitteet-agenda2030>

Fair data economy. Sitra.
<https://www.sitra.fi/en/themes/fair-data-economy/>

Accessibility

Digi kuuluu kaikille website. (Everyone is entitled to digital, in Finnish) Regional State Administrative Agency.
<https://www.saavutettavuusvaatimukset.fi/>

Open access

Tekijänoikeuslain kulttuuriperintölaitoksia koskevat uudet säännökset: KAM-juridiikkaryhmän soveltamisohje, 2023 (New provisions of the Copyright Act concerning cultural heritage institutions. Application guideline by the GLAM law group. In Finnish.) <https://www.doria.fi/handle/10024/187897>

Tietosuoja KAM-sektorilla. Suositellut toimintatavat henkilötietoja sisältävien aineistojen käsittelyyn kirjastoissa, arkistoissa ja museoissa. (Data protection in the GLAM sector. Recommended methods for processing material containing personal data in libraries, archives and museums. In Finnish.) Henriksson, Juha (chair) and working group, 2020. https://musiikkiarkisto.fi/kam/wp-content/uploads/2020/10/Tietosuoja-KAM-sektorilla-v1_1.pdf

Europeana Public Domain Charter. <https://www.europeana.eu/en/rights/public-domain-charter>

Nudging Users To Reference Institutions When Using Public Domain Materials. Creative Commons, 2024. <https://creativecommons.org/wp-content/uploads/2024/02/Nudging-Users-to-Reference-Institutions-when-Using-Public-Domain-Materials%E2%80%94Creative-Commons-Guidelines-1.pdf>

Assessment of digital policy

MOI self-assessment model. (in Finnish) Finnish Heritage Agency, 2022. <https://www.museovirasto.fi/fi/museoalan-kehittaminen/tyokalut-ja-verkostot/museoiden-arviointi-ja-vertaiskehittaminen/moi-itsearviointimalli>



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