

Visitor Services Policy: guidelines to writing

Museums would be dull and quiet places if nobody came to look at them. Museums rely on visitors to keep them open, relevant, vibrant and informed. A Visitors Services Policy outlines how visitors are managed and ensures that all are welcomed and encouraged to enjoy the experience of visiting the museum. It also makes certain that appropriate facilities are provided for the comfort and safety of visitors.

This document will assist you in writing a Visitors Services Policy.

Using this document

This document is presented as a series of headings and questions.

The headings can be used to structure the Visitor Services Policy.

The questions, and the notes beneath, are intended as prompts to guide decision making about the content of the Visitor Services Policy.

Write brief statements or lists, as appropriate, in answer to the questions in order to build up the content of the Visitor Services Policy.

Museums may choose to work through this document independently, or, on request, the History Trust can facilitate a meeting to guide the process.

Attracting Visitors

- *How is the museum, its activities and collection, promoted?*

Set out the ways in which the museum is promoted to visitors and other potential users of the collection, such as researchers. It may be useful to include a list of current promotional/advertising activities, as this can then be reviewed from time to time.

Consider both paid advertising and other methods, such as presence at local events. Outline who is responsible for making sure brochures are updated and reprinted when required and that events such as open days are advertised on time. If the museum has a website, record who is responsible for ensuring that content and contact details are kept up to date and note how often this should be checked.

Managing Visitors

- *How will visitors to the museum be managed?*

Establish regular and consistent opening and closing hours for the museum. You could include a proviso that these could be reviewed in light of changes in visitor numbers. Opening more often may make the museum more visible. Closing during very quiet periods may allow more research and collection preservation work to be done by volunteer workers.

Provide guidelines for staff about how visitors to the museum are to be greeted and introduced to the museum. Outline ways in which staff can provide appropriate and friendly customer service.

- *How will visitor numbers be recorded?*

Keeping a record of visitor numbers can help you to identify when the museum is busy and when it is quiet. With this information you can ensure that there are enough museum workers at busy times to assist visitors. Keeping a daily tally sheet is a simple way of recording total visitor numbers.

Consider recording different types of visitors separately. For example keep a tally of

- school students
- visitors in booked tour groups
- casual visitors – locals and tourists.

You can also record the types of visitors to the museum by the category of entrance fee they pay, if one is charged. For example, keep a tally of adult, children, concession and family ticket sales. Sometimes museums ask for postcodes to gather an idea of the districts from which visitors come.

- *What is the process for managing bookings?*

List the kinds of bookings that might be made. This could include group tours (such as bus tours and school groups) visits by individuals, families and other small groups if the museum is generally open by appointment, and bookings for special events.

List what needs to be written down and followed-up when a booking is taken. Include

- Who is responsible for taking bookings and where details are to be recorded.
- The information that needs to be taken down such as: name of visitor or group organiser, date and time of visit, contact details. If taking details of a group tour, note how many participants and if the group has any particular interests or needs, such as special access requirements.
- How does the museum ensure that there will be a tour guide available on the appointed day? Guides might nominate days they are available and

be contactable by phone/email to confirm their availability for a particular tour. Making sure there is always a back-up guide is important in case of illness or inability to run the tour at short notice.

- Record who is responsible for ensuring that enough brochures/maps and other visitor resources are available.
- Note down the procedures to be followed in the event of a cancellation.
- *How will enquiries and requests for access to the collection and files be managed?*
 - Decide who is responsible for receiving enquiries relating to the museum and the collection. Will the same or different people deal with telephone, mail and email enquiries?
 - Decide a reasonable timeframe for responding to enquiries and designate who is responsible for answering what type of enquiries. For example, one person may respond to general enquiries, and another to requests for special access to the collections. Archival enquiries and questions related to museum items might be answered by different people.
 - Consider whose phone numbers or email addresses will be used for public contact, or if a museum email address, website (with a 'contact us' facility) and/or answering machine will be used.

Information about access to collection items and records should be mentioned in the museum's Collection Policy, so it may be useful to include a reference to that policy in the Visitor Services Policy.

- *How will events be managed?*

Consider what other factors need to be considered when managing visitors at larger events such as open days or celebrations.

- Record who will manage bookings and how they will be recorded and followed-up
- Outline who is responsible for making certain that sufficient workers are available to manage the event.
- *How will complaints be managed?*

Consider what needs to be done if the museum receives a complaint from a visitor. Outline the procedures that need to be followed.

- Consider how complaints might be received. Someone might make a face to face complaint during their visit to the museum. In this case, who will the complaint be referred to? Consider whether visitors might be invited to fill in a complaint form or write a formal letter.
- Who is responsible for responding to complaints? If a complaint is received by phone, who will the call or message regarding the call, be passed on to. If it is by letter or email, who is responsible for writing a reply?
- In addition, who is responsible for following-up the issues or problems the complaint might have raised.

Informing visitors

- *How are visitors made aware of key information about the museum?*

The museum will need to ensure that all workers are aware of the museum's purpose, key objectives and activities so that they can pass this information on to visitors. Alternatively the museum will need to provide information about these primary aims in the form of a leaflet or brochure. Outline the ways in which the purpose of the museum will be shared with visitors.

Managing finances

- *How will financial transactions be managed?*

Consider what sorts of financial transactions will occur at the museum and how they will be managed. They might include

- Entry fees
- Museum shop sales of merchandise and souvenirs
- Tea and coffee sales if applicable
- Any additional fees such as for rides or specific attractions/shows.

In relation to payments you will need to:

- Establish fees for all categories of visitor and for all other products.
- Note whether only cash is accepted. If the museum has facilities for credit card transactions make certain that workers are trained to use this facility.
- If the museum has a cash register or a cash box, record who is responsible for ensuring that the cash box has a float with sufficient change and who is responsible for banking daily takings.
- Make sure that a receipt book is available in case a visitor requests a receipt. Note where this and the cash box are to be kept during opening hours and after hours.

Facilities and safety

- *How are visitors made to feel comfortable, safe and welcome?*

Museums are required to offer facilities for the safety and comfort of visitors. These range from simple requirements to services which enhance visitors' enjoyment of the museum and spur them to spread the word about their experience. Visitor facilities that might need regular monitoring should be listed in this part of the policy, including

- Adequate indoor lighting for viewing displays and navigating the museum safely.
- Good outdoor lighting to ensure safety if the museum is open in the evening or at night.
- Cloak room/lockers or other secure area for storing bags and coats.
- Eating areas – this might be an outdoor area which could be used by school and other tour groups.
- Toilet facilities. Ideally these would include facilities for people with a disability and for parents for feeding and/or changing babies. These will

need to be kept clean and supplies regularly checked. You could include reference to a roster for these duties.

- Seating outside and inside the museum.
- Resource area where visitors can seek more information about the museum and the district.

- *How does the museum ensure that its visitors are safe?*

Outline measures put into place to ensure the security of visitors. For example there might be a policy of always having more than one general staff member on duty so that one can work at the reception/entry area and one can walk around the museum and keep an eye on visitors. The museum might also have ensured that handrails are installed next to stairs and inside toilet facilities.

- *How are accidents and other incidents recorded, reported and followed up?*

Outline the procedures that need to be followed if an accident occurs at the museum. For example the policy should list:

- Who the accident needs to be reported to
- How the report must be received and recorded. The museum may have an accident report form which needs to be filled in
- Who the on-site first aid officers are
- Emergency numbers for Ambulance and Police
- What follow-up procedures need to be carried out after the accident has been recorded.

- *What emergency evacuation procedures are in place and how are visitors made aware of them?*

Outline the procedures for an emergency evacuation. You will need to include information about

- Who is in charge of an evacuation – is there an appointed Fire Warden?
- Where alarms are positioned and who is responsible for setting them off
- Where the emergency exits are and any information about how they need to be operated/opened
- Where the assembly area is
- How visitors will be informed that they can return to the premises.

You will also need to show how visitors are made aware of these procedures – whether at the beginning of a guided tour or by alerting them to instructions on a wall sign or on a hand-out.

- *What insurance cover does the museum have?*

Does the museum have current public liability cover?

Provide details of the Insurer, a description of the kind and amount of cover and a note about when the policy falls due for renewal each year.