



Project to define professional functions and standards in archaeological practice

National Occupational Standards for Archaeological Practice

Accredited Standards

Section H

21st March 2003

Dr Stephen Carter
Alastair Robertson



Summary of Units and Elements

Ref	Unit & Element titles
H	Promote an understanding of the historic environment
AH1	Develop the organisation's education and learning strategy
AH1.1	Develop the organisation's education and learning strategy
AH1.2	Develop a programme to implement the education and learning strategy
AH2	Commission work on interpretative and educational media
AH2.1	Prepare a brief for a specialist to produce media
AH2.2	Select a specialist
AH2.3	Evaluate educational and interpretative media
AH3	Identify and evaluate the requirements of users of exhibitions or interpretative activities
AH3.1	Identify current and potential users and their needs
AH3.2	Evaluate the impact of exhibitions or interpretative activities on users
AH4	Plan and deliver interpretative activities
AH4.1	Plan the use of resources
AH4.2	Deliver and evaluate an interpretative activity
AH4.3	Develop information materials to support an interpretative activity
AH5	Plan marketing activities
AH5.1	Develop a marketing plan
AH5.2	Develop and distribute marketing materials
AH5.3	Evaluate the success of marketing activities

Unit AH1 Develop the organisation's education and learning strategy

Elements

AH1.1 Develop the organisation's interpretation and learning strategy

AH1.2 Develop a programme to implement the interpretation and learning strategy

Unit Commentary

This unit is for archaeologists who have responsibility for designing and implementing the strategies and policies of the organisation for interpretation and learning programmes which may have a specialist purpose or be directed towards the wider public. It is important to devise a strategy for the use of the organisation's resources in terms of education and learning. This involves: reviewing the organisation's current interpretation and learning strategy; the available resources; current and potential users and their learning styles and their needs; and involving potential partners that can help with the delivery of the programme.

Using this information, current strategies may need to be revised and programmes may need to be developed to implement the education and learning strategy. This will involve ensuring that the programme is in line with the policies of the organisation both in terms of internal and external users, so that resources are identified and secured and innovative and creative learning approaches are encouraged.

AH1 Develop the organisation's education and learning strategy

AH1.1 Develop the organisation's interpretation and learning strategy

Performance Required

This will involve:

- a) Ensuring you understand the organisation's policies and guidelines for internal and external learners
- b) Reviewing the organisation's current **interpretation and learning strategy** and the available resources
- c) Consulting with **stakeholders** to ensure the strategy fulfils their requirements
- d) Identifying clearly the constraints affecting user education and assessing their **impact**
- e) Identifying potential partners to help with the delivery of the programme
- f) Identifying target audiences, their different learning styles and methods for accommodating them
- g) Exploring thoroughly the possibilities for education and learning, and generating new ideas
- h) Identifying realistic, measurable aims and targets for the strategy
- i) Ensuring that the strategy is in accordance with relevant legislation, organisational guidelines and best practice
- j) Evaluating and revising the strategy on a periodic basis

Occupational Context

1 Interpretation and learning strategy

- activities
- structure
- content
- delivery
- accreditation arrangements
- learning development
- review

2 Stakeholders

- local and central government
- community groups
- teachers and parents
- education bodies
- special interest groups
- training providers
- specialist / professional groups

3 Impact

- personal professional development
- organisational/ departmental security and development

Knowledge Requirements

You need to know and understand how to:

- Achieve specified learning outcomes

You need to know about:

- The internal and external policies on education and learning
- The stakeholders who need to be consulted
- The current state of research on education and learning
- How the cultural context can effect the education and learning strategy
- The needs of the target audience
- The main learning styles of the target audience
- Relevant national guidelines and legislation on the provision of learning materials

AH1 Develop the organisation's education and learning strategy

AH1.1 Develop the organisation's interpretation and learning strategy

Required Skills

You should demonstrate:

- Strategic planning
- Organising and delegating responsibilities

Evidence Required

You should provide evidence that you can develop the organisation's education and learning strategy

The candidate should be questioned, based upon the documentation provided, to explore how they:

- develop the organisation's strategy for education and learning.

You will identify how the availability of funds, people and facilities affects the strategy, and the strategy should address the formal and informal education needs of users.

Evidence Rules

The candidate should have been involved in devising strategy in their organisation over a period of time

AH1 Develop the organisation's education and learning strategy

AH1.2 Develop a programme to implement the interpretation and learning strategy

Performance Required

This will involve:

- a) Developing a programme of activities that will deliver the aims and targets of the education and learning strategy
- b) Consulting with stakeholders and **users** concerning the content and approach of the programme
- c) Presenting information on the **programme** in formats that are suitable for different audiences
- d) Ensuring the programme is in line with the policies of the organisation and meets **specified user requirements**
- e) Ensuring the programme takes into account the need for and encourages innovative and creative learning approaches
- f) Identifying and securing the **resources** to deliver the programme
- g) Identifying clearly the timescales for the programme and agreeing them with all the relevant people
- h) Identifying the effect of the programme on other activities and people, and taking appropriate steps to co-ordinate activities

Occupational Context

1 Users

- Current/ intended
- Future/ potential
- Individuals/ groups
- Professional/ lay
- Learners/ informers/ researchers/ decision-makers

2 Programmes

- formal
- informal
- directed
- user-directed

3 Specified user requirements

- relating to needs (e.g. personal development, specific learning attainment, public information, policy change, understanding of local and national cultural heritage)
- relating to desired learning outcomes

4 Resources

- human resources: professionalism and expertise (training provider)
- material resources: educational/ training tools (funding bodies)

Knowledge Requirements

You need to know and understand how to:

- Identify the learning needs of different target audiences
- Set measurable learning outcomes
- Design activities for different target groups and planned learning outcomes

AH1 Develop the organisation's education and learning strategy

AH1.2 Develop a programme to implement the interpretation and learning strategy

Required Skills

You should demonstrate:

- Curriculum development

Evidence Required

You should provide evidence that you can develop a programme to implement the education and learning strategy

The candidate should be questioned, based upon the documentation provided, to explore how they:

- develop a programme of learning events and activities to meet the educational needs of users.

Users will include current and potential users as individuals and as groups. The types of programmes should include formal and informal (directed and user-directed).

Evidence Rules

The candidate should have been involved in developing programmes of education and learning activities in their organisation over a period of time

Unit AH2 Commission work on interpretative and educational media

Elements

AH2.1 Prepare a brief for a specialist to produce media

AH2.2 Select a specialist

AH2.3 Evaluate educational and interpretative media

Unit Commentary

This unit is for archaeologists who have responsibility for commissioning work on interpretative and educational media. In order to support and promote the interpretative and educational activities of the organisation, it is necessary to produce and evaluate media. This may involve preparing briefs for specialists (including designers, subject specialists, educators) to produce media. These briefs need to satisfy organisational and legal requirements, describe the learning and interpretative objectives of the finished media and clearly identify the extent and type of audience for the activities.

Specialists need to be selected from the bids received as a result of the briefs. This involves defining selection criteria and level of information required from those bidding for work, specifying selection procedures and selecting and confirming specialists. Once the specialists have completed their work, the media needs to be evaluated. This involves assessing whether the media produced meets the specifications of the briefs, and the specifications as outlined in the specialists' bids, obtaining feedback from people using the media, and providing feedback on the evaluation to influence the selection process and revise the media.

AH2 Commission work on interpretative and educational media

AH2.1 Prepare a brief for a specialist to produce media

Performance Required

This will involve:

- a) Writing **briefs** that satisfy organisational, legal and site requirements
- b) Clearly describing, within the brief, the **learning and interpretative objectives** of the finished media
- c) Ensuring work objectives in the brief are clear, accurate and contain all relevant details
- d) Ensuring the achievement of the work objectives is practicable and realistic
- e) Identifying clearly the extent and type of audience for the exhibition or interpretative activity
- f) Ensuring the specifications are achievable with the available accommodation, resources and timescale
- g) Specifying clearly the **criteria for evaluating success** of the work

Occupational Context

- 1 **Briefs for:**
 - designers
 - subject specialists
 - educators
- 2 **Learning and interpretative objectives**
 - temporary/ long term use
 - for individual education/ public information/ policy change/ cultural heritage
- 3 **Criteria for evaluating success**
 - relating to organisational policy, including Best Practice
 - relating to public policy, social welfare/ education and cultural heritage
 - relating to delivered outputs, measurable outcomes and impacts
 - relating to the objectives, direction and promotion of the discipline of archaeological research and practice

Knowledge Requirements

You need to know and understand how to:

- Identify the audience
- Specify requirements to enable them to be met
- Specify criteria for evaluating the success of the specialist's work

- *You need to know about:*
 - The legal, organisational and site constraints
 - The appropriate format for different types of brief, and the information that should be included
 - How a brief differs for each type of specialist
 - The activities and features in the organisation that impact on the brief
 - The resource constraints on the brief
 - How the learning and interpretative objectives were agreed

AH2 Commission work on interpretative and educational media

AH2.1 Prepare a brief for a specialist to produce media

Required Skills

You should demonstrate:

- Communication skills
- Budgeting
- Programme management

Evidence Required

You should provide evidence that you can prepare a brief for a specialist to produce media

The candidate should be questioned, based upon the documentation provided, to explore how they:

- prepare a brief for a specialist to produce interpretative or educational media.

The specialists involved must include designers, subject specialists and educators.

Evidence should be provided for media designed for temporary and long-term use.

Evidence Rules

The candidate should have been involved in commissioning at least 2 substantive projects.

AH2 Commission work on interpretative and educational media

AH2.2 Select a specialist

Performance Required

This will involve:

- a) Obtaining information on specialists and assessing its reliability
- b) Defining selection criteria and the level of information required from those bidding for the work
- c) Specifying clearly the selection procedures and requesting the appropriate people to participate
- d) Matching information on applicants correctly against the selection criteria
- e) Identifying the factors affecting the selection decision and recording them
- f) Identifying and promptly obtaining any additional information needed to make the selection
- g) Informing the people who have been selected of the decision and confirming their willingness to proceed
- h) Informing the people who have not been selected of the decision as soon as possible

Occupational Context

Not applicable

Knowledge Requirements

You need to know and understand how to:

- Use data to draw accurate conclusions
- Remain impartial
- Record information on the selection process

You need to know about:

- The main sources of information on different specialists
- The aims of a tendering process

AH2 Commission work on interpretative and educational media

AH2.2 Select a specialist

Required Skills

You should demonstrate:

- Clarity in communication
- Influence on decision-makers

Evidence Required

You should provide evidence that you can select a specialist

The candidate should be questioned, based upon the documentation provided, to explore how they:

- select a specialist to produce interpretative or educational media.

The specialists involved may include freelance writers, editors, designers, subject specialists and educators.

Evidence should be provided for media designed for temporary and long-term use.

Evidence Rules

The candidate should have been involved in commissioning at least 2 substantive projects.

AH2 Commission work on interpretative and educational media

AH2.3 Evaluate educational and interpretative media

Performance Required

This will involve:

- a) Assess the interpretative or educational media against the evaluation criteria
- b) **Trial** aspects of the media where possible
- c) Assess whether the media produced meet the specifications of the brief
- d) Assess whether the media produced meet the specifications as outlined in the specialist's proposal
- e) Assess whether the media produced will **deliver** the learning and interpretative objectives
- f) Obtain feedback from users on the quality of the media
- g) Provide feedback on the evaluation to influence the selection process and to revise the media
- h) Review the suitability of the evaluation methods and make recommendations for **further improvements**

Occupational Context

1 Trial

- Pilot procedures
- Inviting initial responses and feedback to proposals
- Speculative investigation using previous research/ practice outcomes

2 Deliver

- To the targeted audience/s
- Within the designated time scale
- According to the proposal/ plans for interpretation
- Utilising the full capacity of organisational resources

3 Further improvements

- To evaluation measurements
- To monitoring data
- To processes and procedures
- To consultation and negotiation process

Knowledge Requirements

You need to know and understand how to:

- Run trials of materials
- Evaluate the impact of media on users
- Obtain feedback from users
- Review evaluation methods

You need to know about:

- How interpretative media can help people to understand and appreciate cultural heritage
- How educational media can help people to learn

AH2 Commission work on interpretative and educational media

AH2.3 Evaluate educational and interpretative media

Required Skills

You should demonstrate:

- Evaluation processes and procedures
- How to assess the validity and reliability of outputs

Evidence Required

You should provide evidence that you can evaluate educational and interpretative media

The candidate should be questioned, based upon the documentation provided, to explore how they:

- evaluate educational and interpretative media.

The evaluation must include at least one written evaluation of the work of a specialist.

Evidence Rules

The candidate should have been involved in commissioning at least 2 substantive projects.

Unit AH3 Identify and evaluate the requirements of users of exhibitions or interpretative activities

Elements

AH3.1 Identify current and potential users and their needs

AH3.2 Evaluate the impact of exhibitions or interpretative activities on users

Unit Commentary

This unit is for archaeologists who have responsibility for exhibitions and interpretative activities¹. It is important to identify and evaluate the requirements of users of learning and interpretative activities. This involves identifying current and potential users, both as individuals and in groups, and their learning, educational and social needs. It also involves gathering information through suitable collection methods and from all relevant sources and consulting representative groups of users to determine their current and future needs. This information needs to be analysed and related to the organisation's learning strategy.

The impact of interpretative and learning activities on users needs to be evaluated. This involves using information from a variety of sources such as surveys, admissions data and knowledge and observations of staff. This information needs to be analysed and recorded so that the feedback can be used to influence the strategy for interpretation and to revise the evaluation activity.

¹ **Interpretative Activities** – these can take a number of forms and involve creating visual or multi-media scenarios that assist the public in understanding the historic environment. A 'son et lumière' event could be one such interpretive activity

AH3 Identify and evaluate the requirements of users of exhibitions or interpretative activities

AH3.1 Identify current and potential users and their needs

Performance Required

This will involve:

- a) Identifying the makeup of and **characteristics** of current users
- b) Identifying those in the target group who do not participate and their **characteristics**
- c) Obtaining **information** from all relevant **sources** to inform an analysis of factors affecting user participation
- d) Categorising current and potential users in relation to potential **needs**
- e) Consulting groups representative of the target audience to determine their current and future **needs**
- f) Assessing the feasibility of attracting the specified audiences
- g) Relating the information gathered to the organisation's learning and communications strategy
- h) Reporting the results of the analysis accurately and clearly in an appropriate format
- i) Complying with relevant legislation and guidelines on consumer research

Occupational Context

1 Characteristics (of users and non-users)

- age
- social class
- education
- income
- reasons for participation / non-participation

2 Information

- qualitative /quantitative
- measurable/ valid
- reliable/ up to date

3 Sources

- admissions data
- booking records
- surveys
- knowledge and observations of staff
- monitoring information
- publications/ reports

4 Needs

- education
- leisure
- social
- cultural
- special interest

Knowledge Requirements

You need to know and understand how to:

- Collect information on users and non-users
- Categorise users, and the criteria that can be used
- Consult with different types of users
- Conduct user research

You need to know about:

- The value of different sources of information
- The strengths and limitations of questionnaires and other methods of audience research
- The factors that determine the feasibility of attracting specified audiences
- Who should be involved in the review of the information
- The organisation's interpretation strategy
- Relevant legislation and guidelines (including the Disability Discrimination Act)
- Internal and external policies on learning and social inclusion

AH3 Identify and evaluate the requirements of users of exhibitions or interpretative activities

AH3.1 Identify current and potential users and their needs

Required Skills

N/A

Evidence Required

You should provide evidence that you can identify current and potential users and their needs

The candidate should be questioned, based upon the documentation provided, to explore how they:

- identify current and potential users of learning and interpretative activities
- identify potential educational, leisure and study needs.

Qualitative and quantitative information must be obtained from a variety of sources that are likely to include admissions data, booking records, knowledge and observations of staff, and publications.

Candidates will normally provide evidence of collated information on current and potential users and an analysis of the information in a written or graphical form, often as part of a proposal for a new display or interpretative activity.

This would be supplemented with a significant degree of questioning to explain the rationale behind the identification of user needs and to demonstrate that the knowledge areas were fully covered.

Evidence Rules

The candidate should have been involved in a range of learning activities

AH3 Identify and evaluate the requirements of users of exhibitions or interpretative activities

AH3.2 Evaluate the impact of exhibitions or interpretative activities on users

Performance Required

This will involve:

- a) Determining the **criteria** for success
- b) Selecting the evaluation methods and implement them correctly using suitable and valid information collection methods
- c) Accessing all relevant sources of information
- d) Analysing and quantifying the results of the evaluation, recording them clearly in an appropriate format
- e) Providing **feedback** on the evaluation to influence the strategy for learning and to revise the evaluated activity
- f) Reviewing the suitability of the evaluation methods and making recommendations for further improvements

Occupational Context

1 Criteria (may include)

- match with profile of target audience(s)
- visitor satisfaction
- visitor numbers
- income generation

2 Feedback

- lessons learnt
- validity and reliability of evaluation conclusions
- feasibility of responding to those conclusions, short and long-term
- time and cost of evaluation

Knowledge Requirements

You need to know and understand how to:

- Assess whether an information collection method is suitable and valid
- Interpret statistics
- Record the results of the evaluation

You need to know about:

- targets for the activity
- The relevant sources of information
- The different information collection methods
- The value of different sources of information
- The limitations of different types of user survey
- Who should be provided with the results of the evaluation
- The limitations of the evaluation
- Quantitative and statistical methods
- Relevant legislation and guidelines
- Sources on professional advice

AH3 Identify and evaluate the requirements of users of exhibitions or interpretative activities

AH3.2 Evaluate the impact of exhibitions or interpretative activities on users

Required Skills

You should demonstrate:

- Data collection, analysis and interpretation

Evidence Required

You should provide evidence that you can define aims and initial objectives for the project

The candidate should be questioned, based upon the documentation provided, to explore how they:

- evaluate the impact of exhibitions and interpretative and learning activities on users.

This will mean using qualitative and quantitative information from a variety of sources, likely to include surveys, admissions data, booking records, knowledge and observations of staff, and publications.

The evaluations will be both formal and informal, and qualitative as well as quantitative.

Candidates will normally provide written evidence of an evaluation, possibly in the form of a report to senior manager, funders or trustees. Often recommendations will be in the form of memos or other correspondence.

This evidence would be supplemented with a significant degree of questioning to explain the rationale behind the identification of user needs and to demonstrate that the knowledge areas were fully covered.

Evidence Rules

The candidate should have been involved in evaluating a range of interpretative and learning activities

Unit AH4 Plan and deliver interpretative activities

Elements

AH4.1 Plan the use of resources

AH4.2 Deliver and evaluate an interpretative activity

AH4.3 Develop information materials to support an interpretative activity

Unit Commentary

This unit is for archaeologists who have responsibility for the interpretation of archaeological material and sites, for education, display and other public-oriented purposes. Once an idea for an interpretative activity has been formulated, there is a need to realise this idea. This involves deciding on the subject for interpretation and learning, identifying the appropriate media and specifying the target audience. This unit covers planning one interpretation project and evaluating its success.

AH4 Plan and deliver interpretative activities

AH4.1 Plan the use of resources

Performance Required

This will involve:

- a) Identifying the theme for the **activity**
- b) Defining the **target audience** (numbers and composition)
- c) Ensuring that the activity is in accordance with internal and external policies and guidelines
- d) Setting clear targets including learning outcomes for the activity
- e) Identifying the appropriate materials and methods for delivering the theme to the target audience and achieving the learning outcomes
- f) Planning the resources and timescale required to deliver the activity
- g) Securing the resources required
- h) Ensuring that all relevant health and safety and other legal, professional and ethical conditions are complied with
- i) Evaluating the results of the activity including the learning outcome.

Occupational Context

1 Activities

- Talks, presentations, story telling
- Workshops, craft activities, dressing up, re-enactment, making displays
- Handling sessions, demonstrations
- Site tours, guided tours of displays

2 Target audience

- Teachers
- Parents and carers
- Other archaeologists
- Museums and other professionals
- Community groups
- Local interest groups
- Adults and children with or without disabilities

Knowledge Requirements

You need to know and understand how to:

- Plan and resource an activity
- Identify, achieve and evaluate appropriate learning outcomes

You need to know about:

- Internal and external policies, guidelines and codes and policies for social inclusion relating to education and learning, including the national curriculum
- The different learning styles and emotional responses that individuals may possess and appropriate methods for meeting them
- Appropriate interpretative and learning themes and activities for different target audiences including children, young adults, the elderly, people with special needs, the disabled and members of ethnic minorities
- Relevant legislation and codes of conduct
- Detailed knowledge of the theme being prepared
- Potential sources of public and private sector funding

AH4 Plan and deliver interpretative activities

AH4.1 Plan the use of resources

Required Skills

You should demonstrate:

- Excellent communication skills, written and verbal
- Active listening and responsiveness to differing user needs and reactions
- Enthusiasm for and commitment to public access to knowledge and objects
- Flexible and constructive approach to problem solving
- Creativity

Evidence Required

You should provide evidence that you can plan the use of resources

The candidate should be questioned, based upon the documentation provided, to explore how they:

- A portfolio including project plans, budgets, photographs and other records of activities, uses and evaluations.
- Project plans should clearly identify theme, target audience, learning outcomes, delivery methods and compliance with appropriate legislation, codes and guidelines.

Evidence Rules

The candidate should have been responsible for planning at least one interpretative and learning activity, and should have been involved in delivering at least two.

AH4 Plan and deliver interpretative activities

AH4.2 Deliver and evaluate an interpretative activity

Performance Required

This will involve:

- a) Ensuring the interpretative activity is an **honest interpretation** of the subject matter
- b) Delivering the **interpretative activity** in a manner that meets the needs of the audience
- c) Encouraging members of the audience to ask questions and seek clarification at appropriate stages
- d) Choosing sites and locations for the interpretative activity that are appropriate environments and allow maximum visibility
- e) Handling information and items carefully and ensuring that the latter are undamaged
- f) Conducting the interpretative activity within the resource and time constraints
- g) Clearly establishing **appropriate success criteria**
- h) Evaluating the activity using only the established success criteria
- i) Basing all conclusions and subsequent **recommendations** on the results of the evaluation

Occupational Context

1 Honest interpretation

- that which is in line with proposal specifications
- that which is not simulated but which is grounded in evidence
- that which is without bias
- that which is not skewed and steered
- ensuring material evidence retains its integrity

2 Interpretative activities

- include demonstrations; on/off -site programmes; presentations.
- meet the needs of: individuals/groups; the disadvantaged

3 Appropriate success criteria

- in terms of proposed objectives
- in terms of realistic outcomes
- in terms of quantifiable evidence
- in terms of contributing to the profession/ discipline/ society in a constructive and commendable way

4 Recommendations

- for future archaeological practice
- for policy
- for individual / social / cultural behaviour and development

Knowledge Requirements

You need to know and understand how to:

- Ensure evidence presented retains its integrity
- Pace and sequence activities for different audiences
- Encourage audience participation
- Ensure maximum visibility
- Draw accurate conclusions

You need to know about:

- The subject matter at the heart of the interpretative activity
- What constitutes an honest interpretation of the subject matter
- Why evaluation is important
- What size the audience should be for different interpretative activities
- What constitutes an appropriate environment for the interpretative activity
- The resource and time constraints relating to the interpretative activity
- The health and safety regulations that should be met

AH4 Plan and deliver interpretative activities

AH4.2 Deliver and evaluate an interpretative activity

Required Skills

You should demonstrate:

- Risk assessment skills
- Best Practice assessment

Evidence Required

You should provide evidence that you can deliver and evaluate an interpretative activity

The candidate should be questioned, based upon the documentation provided, to explore how they:

- deliver interpretative activities to meet the educational, leisure and study needs of users.

Evidence Rules

The candidate should have been involved in planning and delivering interpretative activities in at least 2 substantive contexts.

AH4 Plan and deliver interpretative activities

AH4.3 Develop information materials to support an interpretative activity

Performance Required

This will involve:

- a) Identifying existing information materials and assessing their suitability for the **interpretative activity**
- b) Identifying the **different requirements** of users of the information
- c) Ensuring the generated information materials are suitable for the purpose and type of interpretative activity
- d) Producing information materials within resource and time constraints
- e) Ensuring the **information materials** are capable of attracting interest and enthusiasm in the interpretative activity
- f) Ensuring the information materials contain valid and reliable information and honest interpretations

Occupational Context

1 Interpretative activities

- include demonstrations; on/off -site programmes; presentations.
- meet the needs of: individuals/groups; the disadvantaged

2 Different requirements [

- in terms of social profile (age, background, education and financial resources)
- in terms of special needs or disabilities, e.g. visual/ hearing impairment, of limited mobility
- in terms of user focus: learning, entertainment, professional development, procuring resources, etc.

3 Information materials include:

- replicas
- descriptions
- labels
- signs,
- guidance materials
- educational materials.

Knowledge Requirements

You need to know and understand how to:

- Review and assess the suitability of information materials
- Undertake research to identify audience reaction to specific media
- Ensure objectivity and test the reliability and accuracy of information

You need to know about:

- The different users of information materials
- The purpose and type of interpretative activity
- How different information materials contribute to the interpretative activity
- The resource and time constraints on the production of information materials
- How information materials can attract interest and enthusiasm for interpretative activities
- What interpretation is and how it differs from providing information
- What constitutes honest interpretation
- The consequences of failing to check the currency, accuracy and reliability of information.

AH4 Plan and deliver interpretative activities

AH4.3 Develop information materials to support an interpretative activity

Required Skills

You should demonstrate:

- Exhibition design skills

Evidence Required

You should provide evidence that you can develop information materials to support an interpretative activity

The candidate should be questioned, based upon the documentation provided, to explore how they:

- develop information materials to support interpretative activities to meet the educational, leisure and study needs of users.

Evidence Rules

The candidate should have been involved in planning and delivering interpretative activities in at least 2 substantive contexts.

Unit AH5 Plan marketing activities

Elements

AH5.1 Develop a marketing plan

AH5.2 Develop and distribute marketing materials

AH5.3 Evaluate the success of marketing activities

Unit Commentary

This unit is for archaeologists responsible for the planning, implementing and evaluating marketing activities, and developing appropriate support material. It covers the identification of objectives for the marketing in the context of the organisations policies and procedures, selection of appropriate marketing activities, preparation of a plan and budget, delivering and evaluating the marketing activity

AH5 Plan marketing activities

AH5.1 Develop a marketing plan

Performance Required

This will involve:

- a) defining the target audience for marketing activities
- b) defining the desired outcome of marketing activities
- c) preparing a **marketing plan** that will attract, satisfy and retain the target audience
- d) costing the marketing plan and securing an appropriate budget
- e) taking into account relevant legislation and guidelines
- f) taking into account internal and external policies, guidelines and codes of conduct
- g) identifying stakeholders and partners
- h) co-ordinating marketing activities with press and public relations opportunities

Occupational Context

1 Marketing plan

- aims
- target audience(s)/markets
- attendance/take-up/income targets
- methods
- materials
- distribution
- costings
- timetable
- evaluation strategy

Knowledge Requirements

You need to know and understand how to:

- Analyse risks and benefits
- Use marketing to attract, satisfy and retain customers

You need to know about:

- Marketing theory and practice
- Target market and audiences
- Effective use of advertising and marketing materials
- Budgeting and financial control
- local and national advertising, distribution and communication media
- Importance of branding and corporate identity
- Effective use of design in marketing
- Key objectives of organisation
- Commercial awareness
- Communications

AH5 Plan marketing activities

AH5.1 Develop a marketing plan

Required Skills

You should demonstrate:

- How to plan and carry out evaluation strategies
- Use of Press and PR
- Copywriting
- Negotiating
- Teamworking

Evidence Required

You should provide evidence that you can Develop a marketing plan

The candidate should be questioned, based upon the documentation provided, to explore how they:

- planned and evaluated commissioned marketing materials.

Evidence Rules

The candidate should have been involved in planning and carrying out at least two marketing activities.

AH5 Plan marketing activities

AH5.2 Develop and distribute marketing materials

Performance Required

This will involve:

- a) producing and commissioning **marketing materials** including advertising in **collaboration with** others and in accordance with the marketing plan
- b) ensuring that all marketing and advertising copy is accurate, up to date and conforms to house style
- c) ensuring that copy is delivered on time and that the production schedules are adhered to
- d) ensuring that content and design are appropriate for the target audience
- e) maintaining cost and quality control and following financial procedures
- f) evaluating marketing activities and providing feedback to the marketing plan

Occupational Context

1 Marketing materials

- free leaflets, flyers, posters, folders, cards, website
- merchandise
- Advertising: newspapers, trade journals, directories, radio, TV
- corporate identity, brands, logo, liveries, uniforms, design manual, house style

2 Collaboration with:

- content providers
- copy writers
- photographers
- electronic and print editors
- illustrators/photographers
- designers
- printer
- advertising manager
- distribution companies
- web designers

Knowledge Requirements

You need to know and understand how to:

- Plan and implement an evaluation strategy

You need to know about:

- Appropriate use of content, design, media and distribution channel for target audience and message
- key objectives of organisation
- Marketing plan
- Relevant legislation and guidelines
- Working knowledge of the structure of professional archaeology in the UK
- Local and national advertising, distribution and communication media
- print and electronic production processes and costs
- Working knowledge of legislation relating to copyright and intellectual property
- Commercial awareness

AH5 Plan marketing activities

AH5.2 Develop and distribute marketing materials

Required Skills

You should demonstrate:

- Copywriting
- Negotiating

Evidence Required

You should provide evidence that you can develop and distribute marketing material

The candidate should be questioned, based upon the documentation provided, to explore how they:

- Develop and distribute marketing material

Evidence Rules

The candidate should have been involved in the development and distribution of two types of marketing material.

AH5 Plan marketing activities

AH5.3 Evaluate the success of marketing activities

Performance Required

This will involve:

- a) clearly identifying achievable, measurable targets for marketing activities and the factors that will **indicate success**
- b) using any opportunities that arise during the marketing activity to collect data that could be used to measure success
- c) designing a strategy for collecting data to measure the effectiveness of an activity
- d) collecting **data** cost-effectively and accurately
- e) producing an accurate analysis of the data against the **indicators** for measuring success
- f) reporting the results of the evaluation fully, clearly and accurately in the required format
- g) using the results of the evaluation to inform **future actions**

Occupational Context

1 Indicators of success must be

- measurable
- achievable
- meaningful

2 Data may include

- attendance/enquiries/awareness/sales/turnover/ profit and loss
- customer satisfaction, new customers, repeat business
- external feedback from professionals/experts/specialists/ consultants

3 Future actions to be informed

- marketing activities
- research
- policy, best practice, procedure, creative content, design, branding
- programme management/ partnerships/ linkages and networks
- training and staff development

Knowledge Requirements

You need to know about:

- Marketing theory and practice
- procedures for evaluating marketing activity
- Quantitative and statistical methods
- Sources of professional advice on evaluation and market research, costs and timetable
- Commercial awareness

AH5 Plan marketing activities

AH5.3 Evaluate the success of marketing activities

Required Skills

You should demonstrate:

- Briefing market researchers
- Data Collection
- Data Analysis
- Interpretation and application of results

Evidence Required

You should provide evidence that you can evaluate the success of marketing activities

The candidate should be questioned, based upon the documentation provided, to explore how they:

- evaluated the success of promotional activities

Evidence Rules

The candidate should have been involved in evaluating marketing initiatives.