

FUNCTIONAL REQUIREMENTS FOR EXHIBIT MANAGEMENT SYSTEMS

CHAPTER I. EXHIBIT MANAGEMENT

A. EXHIBITS PROCESS

Exhibit planning and preparation seem at times to be composed of a flurry of tasks. Bogle⁴ explains that an exhibit designer plans an exhibit in eight phases, each one producing documents. These tasks are: a feasibility study, a schematic design, a preliminary design, a final design, final documentation, construction directions, installation directions, and maintenance directions. Howell,⁵ exhibit preparator for the Natural History Museum of Los Angeles County, puts the activities and events surrounding an exhibit in order. He lists sixty steps in the process, and diagrams where each step fits into the process from planning, design, editing, construction, and installation, to the final exhibit.

Besides the documents produced in the exhibit planning stage, E.C. Osborn and Grace Morley⁶ give an example of a notification form that is sent to the exhibiting museum. Enclosed with it are unpacking and repacking instructions, a check list of items, an installation list, a suggested form for a publicity release, a receipt card, and condition reports to be completed when unpacking and repacking the exhibit.

To clarify the meaning and management cycle of paperwork tasks, in discussing the development of exhibit software, the author will define the following terms:

DOCUMENTATION TASKS

Before exhibit approval, write and present:

1. Exhibit Proposal - Concept and Full Proposal
2. Object List, Photo Records, Handling Restrictions
3. Condition Report
4. Lender List, Location List
5. Gallery Design - Blueprint, Gallery List
6. Exhibit Budget - Financial Summary Proposal: Design, Insurance, Freight, and Catalog

4. Elizabeth Bogle, "What Does an Exhibit Designer Do?," History News 37 (December 1982): 24-27.

5. Daniel Howell, "A Network System for the Planning, Designing, Construction, and Installation of Exhibits," Curator 14 (1971): 100-109.

6. E. C. Osborn and Grace Morley, Temporary and Travelling Exhibits, (Paris: UNESCO, 1963), 63.

Before exhibit:

7. Funding Proposals, Funding Applications
8. Exhibit Schedule

During exhibit preparation and display, prepare:

9. Loan Agreements and Contract Forms
10. Schedule of travelling tour sites and dates
11. Activity Calendar
12. Work Order or Work Requests
13. Invoice, Purchase Order Forms
14. Application for Permission to Reproduce Works of Art
15. Mailing list and Mailing labels for lenders, members, and co-operating museums
16. Insurance Report, Loss Claim Report
17. Packing and Shipping Instructions, Shipping List
18. Crate List, Crate labels
19. Contents Checklist
20. Incoming/Outgoing Receipts
21. Publicity - Press Release, Brochures
22. Catalog, publication manuscript
23. Special Events - Invitations, Advertisement
24. Education Programs - Lectures, Gallery Tours
25. Installation List
26. Gallery Text and Labels
27. Venue List
28. Condition Tracking for travelling exhibit while touring

After Exhibit, write:

29. Exhibit Review
30. Final Report, Attendance Report, Archive Files
31. Annual Report - Exhibit Summary

For a more complete list of tasks, see Chapter III., Task Flow Chart, FAM Travelling Exhibit Documentation. Wittenborg's Good Show! A Practical Guide for Temporary Exhibitions has a very clear sample task schedule of 30 exhibit tasks, the persons involved and the material required to aid in advanced exhibit planning.

7. Witteborg, Lothar P. Good Show! A Practical Guide for Temporary Exhibitions ed. by Andrea Stevens. Washington, D.C.: SITES, 1981.

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DEFINITIONS

1. Exhibit Proposal - Concept and Full Proposal:

Exhibit preparation will vary depending on the size of the institution and the number of staff members. Larger museums use a staff exhibition committee to prepare an exhibit proposal for the Director and the Board of Trustees;⁸ smaller museums may involve only a few staff members. The exhibit proposal contains sections prepared by each staff member outlining their tasks.

In medium sized and larger museums, a curator determines the object names, their value, size and location, and the objects' source. An exhibition department plans the design and estimates time and costs for special mounts, lights, vitrines, background paint, floor treatment, labeling and maintenance. Registrars estimate the packing and transport cost.

Some additional functions the staff needs to include in the proposal are: maintenance, guard and courier cost, filing advance papers on customs charges, writing an insurance floater policy to protect the objects while they are in transit, or a floater for high value specialty items.⁹ A conservator or registrar checks the condition of the objects, if the museum is initiating the exhibit, and supplies photos of the object's condition. Exhibit managers make a total door-to-door budget estimate and prepare loan agreement forms.

Other exhibit proposal tasks might be: planning storage space to receive and to store the works before and after the exhibit, giving the packer a check list and box list, contacting sponsors and writing grant proposals, reviewing the contracts between lending institutions, planning press releases, brochures, posters, articles in the membership magazine, providing for accompanying merchandise, planning to produce a catalogue, preparing for installation, and hiring temporary technicians.

Also covered in the proposal should be: security plans for installation, deinstallation and during the exhibition, and procedures for special group tours, ticketing, and crowd control.

8. D. Andrew Roberts, Planning the documentation of museum collections (United Kingdom: Museum Documentation Association, October 1985), 151.

9. Debra Pughe (Exhibitions Manager, de Young Museum), lecture on "Exhibition Management" 6 May 1985, Museum Management class, J.F.K. University, San Francisco, Instructor Lisa Baylis, Getty Museum.

An exhibition opening event is usually arranged by a special coordinator, and the Education Department prepares programs such as lectures, films, docent and school tours, programs for disabled persons, and audio tours. An estimate must be made for installation and deinstallation time and cost.

If the Trustees approve an exhibit proposal, the exhibit is carried out and the exhibit manager prepares a final report.

2. Object List, Photo Records, Handling Restrictions

A list of the exhibit objects is produced by the curator with a brief description, size and value of each object. Photos of objects may be included, supplied by registrars or lenders. Handling restrictions may be set forth by conservators, registrars or lenders.

3. Condition Report

This form is designed by the conservator or lender to explain the condition of each exhibit object. Tears, discoloration, abrasion and loose or missing pieces are identified. Insurance estimates are based in part on the condition of the object and are prepared by an insurance broker. This information protects the lender if there is any object damage.

4. Lender List, Location List

To help in estimating packing and shipping costs, these lists identify the lender and the location of the object. Freight, courier and customs charges are supplied by transit companies, hotels, airlines and customs brokers.

5. Gallery Design - Blueprint, Gallery List

The designer prepares a preliminary blueprint of the gallery to show installation plans. This design is based on a simple list of the exhibit objects, including size and sometimes photos. Gallery plans can be stored in computer-aided design (CAD) software and objects placed within the previously drawn gallery outline.¹⁰

10. Susan Winslow Waterman, "Computer-Aided Exhibit Design," Museum News (July/August 1988): 39-41. The designer at the San Francisco Fine Arts Museum uses a CAD program.

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6. Exhibit Budget - Financial Summary Proposal: Design, Insurance, Freight, and Catalog

A budget is prepared by the exhibit manager or the staff exhibit committee. It includes the cost of exhibit administration, transportation, installation, deinstallation, security, maintenance, the opening event, graphic design, public relations, and publications.

7. Funding Proposals, Funding Applications

The development staff supply details on funding sources and acquires funding applications from foundations, businesses and individuals.

8. Exhibit Schedule

This may be a year or five year plan for all the exhibits scheduled in the museum or it may be a plan for a particular exhibit, detailing the projected due dates for the exhibit approval, preparation and display tasks. Approval often takes a year. Project management software could be applied here.

9. Loan Agreements and Contract Forms

Once the proposal is approved by the Board of Directors, a Loan Agreement is drawn up between the borrowers and the lenders. This may involve many individuals and their legal representatives, but usually is produced by the originator and signed by the recipients. General terms and fees are set forth, and rules are included about transportation, security, care and conservation, federal indemnity insurance, catalogue and related merchandise, shared expenses, photography and publicity, graphic materials, corporate sponsorship, and cancellation.

10. Schedule of travelling tour sites and dates

Schedules for travelling exhibits are produced by the lender and may include all the venues to help staff meet arrival/installation and departure/deinstallation schedules. Matters such as storage and crating for shipment are planned once dates are set.

11. Activity Calendar

Registrars keep activity calendars to control due dates on insurance indemnity, incoming and outgoing receipts for objects, and freight, courier and customs charges. Exhibit managers use activity calendars to keep the overall process rolling along from

concept proposal to the final attendance report. Exhibit preparators use calendars to order materials and complete the gallery design, installation, and crating by the proper dates.

12. Work Order or Work Requests

Various departments issue work order or work requests to other departments or outside vendors. The curator will send a work request to the designer for labels and the designer will give it to the technicians. It will be signed by the Deputy Director so there is a control on the exhibit budget. This paperwork helps the technicians estimate their project time.

13. Invoice, Purchase Order Forms

The Controller and Bookkeeper receive these requests and allocate the proper funds to the task.

14. Application for Permission to Reproduce Works of Art

The borrower asks the lender permission to publish photographs of exhibit objects. This form is a legal protection for both parties.

15. Mailing list and Mailing labels for lenders, members, and co-operating museums

These mailing lists are produced by the registration and the membership departments. They are used to advertise the events surrounding the exhibit.

16. Insurance Report, Loss Claim Report

The insurance report is prepared by the insurance broker and a certificate of insurance is issued to the lender and the borrowers. The borrower usually pays the insurance fee. The report describes the property, the amount of insurance, the effective dates of coverage, packing, shipping, climate and security arrangements.

17. Packing and Shipping Instructions, Shipping List

These instructions include restrictions placed on objects by the lender or conservator. The instructions travel within the crates to help the next venue repack and ship the exhibit. The shipping list includes all of the exhibit objects, and the shipping companies used to transport the objects.

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18. Crate List, Crate labels

The crate list is used by registrars to estimate insurance, transportation (air and truck), courier, and customs costs. The crate list gives the lenders, the dimensions and weight, the crate number and the catalog number for each object. The packer uses this list to estimate the crate sizes and then to build the crates. Crate labels are made by the packer and registrar to warn the handlers of the contents, fragility, temperature and proper positioning of the crates.

19. Contents Checklist

Checklists are included within each crate so that the contents can be matched against the list.

20. Incoming/Outgoing Receipts

These receipts are signed by the receiver (incoming) and sender (outgoing) of shipments. Receipt and release agreements describe the objects on the front of the form and list the conditions of handling, insurance and other liabilities on the back of the form. This gives the museum legal protection concerning these issues. Copies are kept by the receiver or recipient, the registrar, and a copy for the files. All objects in an exhibit will be received and released with these forms.

21. Publicity - Press Release, Brochures

After sending a formal press release about the exhibit to the local newspapers, the publications department often prepares an exhibit brochure to be used for advertisement and often as a handout during the exhibit. A few photos of the exhibit objects, and text by the education department are joined together in-house by the design department or printed up at a typesetter.

22. Catalog, publication manuscript

The catalog may be a simple listing of the exhibit objects with descriptions or may include a full manuscript written by the curator or a hired writer. The Object list, Photo records, and Lender list information helps to begin the process of planning the catalog. A budget must be submitted to the development department for the author's and editor's fees, printing, typesetting and binding, photography, design, and paper.

23. Special Events - Invitations, Advertisement

A member's preview or an opening night party are typical special events that accompany an exhibit. Invitations must be printed and sent out to the museum members and supporters by the membership department. Advertisement of the event is sent to the newspapers.

24. Education Programs - Lectures, Gallery Tours

A series of lectures are often scheduled to accompany and enrich an exhibit. These may be given by the curator, experts in the field, education staff or docents, trained by the staff. Gallery tours may be offered by the education staff or by docents. Often, special tours for disabled audiences, children, or special interest groups are planned.

25. Installation List

This list is used by the technicians to help during installation and deinstallation of the exhibit. It is accompanied by the designer's plans.

26. Gallery Text and Labels

Usually each museum has a general copy format for labels and gallery text. The Fine Arts Museums has written label guidelines for painting and works on paper, anthropological objects, rugs, costumes and textiles, tapestries, decorative arts, and sculpture. The design department decides the method of printing, from silk screening to computer generated text.

27. Venue List

A venue list is a list of the museums that will show the exhibit, their addresses and phone numbers and the dates the exhibit will be on display. This list is often produced by the registrars and is important in packing, shipping, and insurance details.

28. Condition Tracking for travelling exhibit while touring

Museums have standard Condition and Treatment Report forms that the conservator or registrar check through before an object is released from a collection or from a collector. Registrars retype hand written Condition Reports to include these forms (one on each object) in the loan packet. As each object is received, the registrar or conservator checks the condition of the object and compares it to the written report. Condition Reports must be

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updated and checked at each venue to protect the objects and the rights of the lender. Missing elements, previous restorations, cracks or loose sections, surface conditions, discolorations and tears are all noted.

29. Exhibit Review

A review of the exhibit may be an informal oral report at a staff meeting, recorded with minutes or a formal written report for the Director.

30. Final Report, Attendance Report, Archive Files

The final report, written by the exhibits manager, includes: exhibition title, dates, location, curator, organizer, sponsor, a description of the exhibition, a budget and actual expenses, exhibition revenues, and attendance. It is kept in an archives of past exhibit records.

31. Annual Report - Exhibit Summary

Exhibit information is incorporated in the Annual Report. The Chairman or the Director or Exhibits Chairman often include attendance records and sponsor and lender names in their reports. This includes a short summary of the major exhibits.

Other Definitions:

Travelling Exhibits are temporary circulating shows of materials, objects, ideas or processes with a common theme or subject. They may range from a few objects to major international collections, organized and administered by an agency or by one museum or several museums. A rental fee, costs of transportation, and insurance are usually assumed by the borrowing institution. Scheduling is usually for one month or more at each participating museum.

A Database is a mechanical storage system for facts or data. A database is organized into sets of information in the form of files, with each file containing records and fields. A database is like a filing cabinet that holds folders, each folder filled with records. The filing cabinet records are written on separate sheets of paper. In the computer database, each record is like a separate page. Each line on the page stands for a field and contains information specific to the field name.¹¹

11. Douglas Downing and Michael Covington, Dictionary of Computer Terms (New York: Barron's Educational Series, 1986), 74, 97-98.

Fields hold information in characters. For example, a payroll record can contain three fields: one for the employee's name, a second for his Social Security Number, and a third for his salary per hour. A computer database can provide faster access. This means that the database program inside the computer can retrieve information faster than if the same process was done manually.

A Database Management System (DBMS) can: display and sort information in a variety of ways, select information to meet specified criteria, summarize information, calculate new information from existing records, and print complex reports. A database system helps to manage information. For example, a museum travelling exhibit database might include fields of information for object name, object dimension and object value. The registrar uses these same three fields of information to choose freight carriers, the exhibit designer to design display cases and mounts and the accountant to determine insurance costs. Faster access to object size information can mean better planning of required storage space, exhibit space, and packing crates.

When planning an exhibit or a travelling exhibit, staff need Standard information about object specifications (size, weight and fragility), insurance, loan agreements, packing and shipping, object condition, scheduling, budget, installation, publicity, catalogue, and temporary storage. The detail and dispersal of standard exhibit information depends on the size of the institution or museum and the staff number involved. Larger facilities hire individual staff members to specialize in packing, conservation, registration, exhibit planning and design, accounting, and public relations. Smaller museums have fewer staff members and therefore less dispersal of exhibit information.

Cost effective means that one gets a higher result for a given expenditure or the same result at a lower cost. If the expense of a travelling exhibit database is less than the expense of maintaining a manual documentation or if there is more useful information at the same cost, then the database would be cost effective. Consideration must be given not only to the cost of the computer hardware and software but to the cost of staff time in converting existing files, training, and applying and maintaining the system.¹² Since computers provide faster access, the system would be time effective, or a more efficient way to use time. It takes a matter of seconds to search a computer

12. Patricia Nauert and Caroline Black, Fine Arts Insurance - A Handbook for Art Museums (Washington, D.C.: The Association of Art Museum Directors, 1979), 94.

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database with thousands of records for information contained in a few fields. It might take a half hour or twenty hours to find the same information on file cards.

B. EXHIBIT MANAGEMENT SYSTEM REQUIREMENTS

The use of computers in all phases of exhibit planning, design and installation is an idea that is just beginning to emerge. Museum staff have matured in their knowledge about computers. Staff who develop exhibit systems have benefited from computer experience gained in the various museum departments of accounting, membership, development, publications, education, travel, exhibits and registration collection management. Museum staff also have the backup support of professional agencies and organizations and commercial exhibit companies. Fine Arts shippers and moving companies use computers to track their cargo.

Long-range planning for exhibits includes the process of yearly and five year planning so that the staff can develop a broad range of exhibit themes or ideas and establish a schedule for displaying the permanent collection or travelling exhibitions. This planning process gives the staff a clear sense of direction and helps them formulate a strategy to accomplish their objectives. With a common goal the staff works as a team united around a common purpose. Good planning motivates staff and improves their performance. Long range planning also helps to concentrate resources by keeping the combined cost and number of exhibitions down so that staff and volunteers, the physical plant, and the financial resources will not be severely overextended.¹³

Most exhibits take several years to research and organize, making long range planning imperative. The Impressionist exhibit at the de Young museum had one hundred and fifty paintings from Europe, America and Asia. Each of these works needed curatorial research, loan negotiation, insurance, packing, transporting, hanging in a thematically planned exhibit hall, and written material and photographs on each for an exhibit catalog.

13. Lisa Baylis (Instructor, Museum Management class, J.F.K. University) lecture on "Planning and Control" 18 February 1985.