Exhibition Standards

August 2002

Smithsonian Institution

Office of Policy and Analysis
Washington, DC 20560-0405

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FOREWORD

This paper presents an overview of the nature and function of exhibition standards and/or guidelines. It divides them into two categories: process and product. It illustrates the development and application of standards/guidelines used in conjunction with these categories. Because monitoring techniques generally are not used to determine whether museums comply with standards/guidelines, little information exists regarding their implementation. Research on standards/guidelines is being used to assist our staff in the preparation of our forthcoming report on exhibitions. The purpose of this paper is to present information on standards/guidelines to unit staff who may be unfamiliar with and interested in the body of literature on standards/guidelines. Although several staff from the Office of Policy and Analysis (OP&A) offered helpful advice on various parts of this paper, Kerry DiGiacomo collected the information and wrote this paper. I thank all of them.

Carole Neves
Director
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INTRODUCTION

Standard is a word with multiple meanings. Sometimes, a standard is a minimum requirement or minimum level acceptable; in this case, a standard is generally used for certification or approval purposes. Other times, a standard is a guideline or suggestion for how to do something, typically already proven effective. In technical fields, a standard is often the authorized exemplar of correctness, perfection, or degree of quality. A standard also can be a rule or principle upon which a product is developed or a process is undertaken. Less often, a standard is used synonymously with benchmark, criterion, or measure. Unlike a vision or ideal, a standard tends to be within reach and achievable.

Standards may be voluntary, with the onus placed on organizations to comply, or mandatory, with external agencies regulating and enforcing adherence. Sometimes, the term 'guideline' is used to indicate voluntary compliance and self-monitoring while the word 'standard' distinguishes a prescriptive imposition on an organization.

Organizations develop and/or utilize two principle categories of standards: (1) What or product, and (2) How or process.

> Within the context of the Government Performance and Results Act of 1993, standards are quantitative, tangible, and measurable goals that actual performance is measured against. Standards of performance are part of agencies' performance plans, the mechanism to improve program effectiveness and public accountability. All feed into the agencies' strategic plans for fulfilling their missions.

> The International Organization for Standardization develops management system standards known as ISO 9000. These standards provide organizations worldwide with a management system model that incorporates what those in the field have agreed represent state of the art practices. Primarily, ISO 9000 is concerned with quality management or what organizations do to ensure that their products conform to customers' requirements. ISO does not certify organizations as compliant, though the standards have been incorporated into some public legislation and thus would be monitored by a regulatory agency.

> For the National Board for Professional Teaching Standards, standards are aspects of practice that distinguish accomplished teachers, as decided through professional consensus. Its standards incorporate the essential knowledge, skills, dispositions, and commitments that allow teachers to practice at a high level. The purpose of the standards is to develop and operate a national voluntary system to assess and certify teachers and to advance related education reforms to improve student learning.

The Council for Basic Education (CBE) establishes standards for four reasons:

1. Standards set clear, high expectations for student achievement.

2. Standards provide a basis for teacher and student accountability.

3. Standards promote educational equity because they are intended for all students.

4. Standards help guide efforts to measure student achievement, improve teacher training, develop more effective curricula and instructional strategies, and allocate resources more effectively.

CBE distinguishes between content standards (what a student should know) and performance standards (how or how well do students perform?). For example, if a content standard says that students must run a mile, the performance standards say how fast.

The Better Business Bureau (BBB) publishes basic advertising standards for advertisers, advertising agencies, and advertising media in its *BBB Code of Advertising*. Though not enforced by the BBB, the bureau recommends adherence by industry members as a significant contribution toward effective self-regulation in the public interest.

These two kinds of standards (product and process) are applicable to cultural organizations as well as business and industry. The Getty Information Institute issued this process-based definition:

Standards are mutually agreed upon statements that help to control an action or product. They help create consistency within a group of organizations. Standards represent professional consensus on best practice. Process by which standards are developed: Knowledgeable practitioners codify a reasonable body of practice based on a wide range of experiences.

In his book, *Interactive Excellence: Defining and developing new standards for the twenty-first century*, Edwin Schlossberg sets forth this product-oriented, value-based definition:

The important issue is that excellence is not to be considered as something that resides only in the work itself. Excellence, like popularity, is defined by its relationship with its audience. It is the audience in relationship with the artist that creates standards of excellence. Such standards serve as guideposts for each generation, leading them toward the most interesting and important ideas that must be considered. Standards of excellence also serve as means by which to measure the quality and the purpose of the society at large and, in comparison, the culture.

Standards, in the non-regulatory sense, are currently in place at museums worldwide. Collections managers and conservators know all too well the standards of care for objects,

whether in storage or on display, that aid in their preservation for future generations. Such guidelines have been published for approximately forty years. Registrars have become keenly attentive to documentation standards so that information can be shared among many instead of just a few. This is a relatively recent development beginning in the 1970s with the increased use of computer databases and the conversion of paper records. Standards for exhibitions have experienced slow and belated growth, emerging from broad mandates for a museum to excel in service to visitors as well as from narrower goal-driven educational agenda.

The exhibition standards, guidelines, and principles reviewed for this paper were developed by museums, professionals working with museums and other cultural organizations, and associations; thus, they were issued in several different formats. At times, exhibition standards are singled out from other aspects of museum operations as a single document, and at other times they are embedded within a document guiding museums in all of their activities; as such they are parts of strategic plans, visitor charters, or technical manuals. Prescriptive, mandatory standards are rare, though some standards serve to keep museums in compliance with state and federal laws, such as the Americans with Disabilities Act (ADA).

Exhibition Policies

Increasingly, museums are moving away from exhibition policies that merely prescribe a mix of permanent and temporary offerings, accurate information, and proper care of artifacts. These policies are expanding to include responsiveness to the needs and interests of visitors and communities through research, design, and varied communication strategies.

Articles and Reports by Professionals Working with Museums

In the past seven years, exhibition standards and what constitutes excellence have been, actively discussed topics in the pages of journals and websites devoted to museums (e.g., *Museum News*, *Exhibitionist*). Though such standards are useful to spur discussion among professionals, it is unclear to what extent museums seriously consider these standards and, in response, develop plans or standards of their own.

Accreditation, Registration, and Strategic Planning

In many countries, museums achieve registration or accreditation by the national or regional museum associations by meeting particular standards. Such achievement legitimizes the museums, most importantly, to funders and grant-giving organizations. The standards set forth in these schemes tend not to push established museums toward excellence; rather, they serve to bring new or smaller museums up to par by requiring concrete actions such as having a collections management policy and having an exhibition program that includes a variety of permanent and temporary offerings. Documents issued to help cultural institutions develop strategic plans discuss the importance of performance indicators and techniques for measurement in the broad sense, without dictating what those indicators or tools should be. Valid measures of

visitors' experiences in exhibitions continue to elude museums, which generally turn to proxy measures such as number of visits and durations of visits.

Charters

A growing number of museums and galleries in the United Kingdom and Australia have set standards through what they call Customer or Service Charters. Such documents appear on web sites, in brochures, and/or on signs in the museums. The museums, very publicly, outline how they will hold themselves accountable to the visitor.

These charters cover more than just the exhibition program at a museum and the most prevalent criteria appear to relate to information (providing accurate, up-to-date information both within the museum and in advertising) and visitors feeling welcome at the museum (friendly, knowledgeable, and helpful staff). Aspirations to teach visitors or have them feel they have learned, traditional goals of museums, are conspicuously absent or only hinted at – "inform"; "be intellectually stimulated and challenged by our programs"; "produce high quality enjoyable educational programs"; and "be able to learn from and enjoy our programs."

In the United Kingdom, the content of service charters appears to support compliance with the museums registration scheme (Museums and Galleries Commission); being a registered museum is analogous to being an AAM accredited museum in the U.S.

Guidelines for Specific Elements of Exhibitions

Individual museums issue guidelines for specific elements of exhibitions more often than standards for exhibitions as a whole or programs of exhibitions. Within areas such as conservation and construction, there are "industry" standards upon which museums base their own documents. More enforceable at the department level, these guidelines are aimed at quality assurance and establishing the museum brand via the look and style of exhibitions.

THIS PAPER

Defining what makes a good exhibition, or even what distinguishes an exhibition of excellence, is a challenging task. At the Smithsonian, the breadth of topics, collections, and audiences served introduces additional complicating factors for those who develop and evaluate exhibitions. This paper will illustrate standards, principles, and guidelines for exhibitions to show the multitude of ways exhibition makers can strive for excellence and inform readers how museums can measure the performance of their exhibitions.

In 1999, when a task force of National Association for Museum Exhibition (NAME) members reported on excellence in exhibitions, its report divided indicators of competence and excellence into two broad categories: *Process*, or the professional protocol behind an exhibition, and *Product*, or the audience experience. The group "consciously and specifically chose not to define product excellence in professional terms [believing] the purpose of the product is to serve the visitors' needs [and is] the only justifiable measure of excellence in an exhibit." However, there are times when the two are intermeshed as a hybrid. First, this paper will discuss inward looking process standards, then expansive product standards, and, finally, hybrid types.

PROCESS STANDARDS

With regard to process-oriented standards and those focused on serving internal needs, two sets of standards, written by museum associations, offer guidance on a breadth of issues.

(1) The Alberta Museums Association *Standard Practices Handbook* devotes a chapter to exhibitions that serves mostly as a primer on the development and management of exhibitions and exhibition programs. Suggested readings are listed under each subheading (e.g., traveling exhibitions, visitor orientation, the project team, etc.).

(2) The NAME task force identified standards related to enhancing collaboration, eliminating waste of money and time, redefining the field, assuring public support for museums, and finding new resources.

Much more common than the standards mentioned above are those designed to address specific aspects of exhibitions, such as care of collections, accessible spaces, and text.

Collections

Though standards have long existed for the care of stored collections, the National Park Service (NPS) went further to establish guidelines for the exhibition of their collections. The Division of Conservation at NPS worked closely with exhibit designers and fabricator to bridge the gap between the dual obligations museums have to preserve collections as well as use them. The resulting 370-page *Exhibition Conservation Guidelines* presents principles and techniques for systematically incorporating preservation in exhibition planning, design, and fabrication through narratives, technical notes, and technical drawings.

The American Society for Heating, Refrigeration and Air Conditioning Engineers (ASHRAE) is another source on the care of artifacts while on display. The *1999 ASHRAE Handbook – HVAC Applications* includes a chapter on museums, libraries, and archives that summarizes materials research. Within five classes of climate control (temperature, relative humidity, and air filtration), research results are used to recommend the maximum fluctuations permissible by three classes of control. Loan exhibitions and permanent collection displays where there are significant seasonal climate changes should adhere to the highest standard (AA), while permanent displays without seasonal changes should adhere to class A standards and permanent displays in seasonal museums (i.e., closed in winter) should adhere to class B standards.

Designing for Accessibility

In the United States, standards for accessible design are important for compliance with the Americans with Disabilities Act. Most museums and training programs that give explicit attention to accessibility concerns in exhibitions cite the *Smithsonian Guidelines for Accessible Exhibition Design* and principles of universal design as the key sources on the topic. In the UK,

museum policies are written around the *Guidelines on Disability for Museums and Galleries* and *Disability Resource Directory for Museums* (Museums and Galleries Commission).

Often, visitor and service charters prominently mention accessibility issues and how the museum will not only provide physical access to all, but other visitor services as well. For example, the Cheltenham Art Gallery and Museum's Service Charter states:

> We are constantly striving to improve access for all visitors and try to ensure there are as few barriers as possible to the understanding and appreciation of the museum's collection. We will take into account, as far as possible, the needs of people with physical, hearing and sight disabilities. Please contact us if you have any special requirements. We have an access audit and policy.

Text

Guidelines for writers and editors provide text hierarchy structures, word/paragraph limits, target reading levels, and preferred styles of language. Text guidelines steer writers toward a tone and style that is museum-specific. For example, The Tech Museum of Innovation's editorial and graphic guidelines discuss consistent use of "The Tech voice" to engage visitors. This means, among many criteria, using the active voice, being concise, and encouraging participation and not using too many new vocabulary words or jargon. Guides issued by the Powerhouse Museum have been utilized by museums across Australia. Entire books have been published on the topic of exhibition text – most notably *Exhibit Labels: An Interpretive Approach*.

Hugh A. D. Spencer, a contributor to *The Manual of Museum Exhibitions*, identifies clear succinct benefits of text standards. The careful selection of typeface supports the design vocabulary of the exhibition as well as ease of readability. Effective use of the written word enhances public access physically (for a range of ages and abilities), intellectually (through presentations that motivate reading), and by integrating with the overall design of the exhibition instead of competing with other elements. He points out that standards help to achieve a better balance among specialist perspectives within the museum (i.e., curator/researcher, designer, and writer/interpreter).

Product Standards

Externally focused standards are characterized by three pervasive themes:

(1)   Exhibitions should be developed and executed with a focus on the end-user (visitor) and his/her experience within (as well as before and after), expectations for, access to, and navigation of exhibitions. Visitors should feel that their exhibition experience was stimulating, relevant, and enjoyable. For example:

- Exhibitions should be presented in a way that makes them enjoyable, stimulating and relevant to the museum's target audiences.

- Exhibitions should be memorable, aesthetically beautiful, and enjoyable.

- Exhibitions should relate to visitors. Broken exhibits, intimidating labels, and activities that visitors can't relate to are barriers to visitor enjoyment that lead to frustration, boredom, and confusion.

- Satisfaction should be the cumulative gestalt of the whole visit, influenced by factors that came before; the feelings you walk away with.

- Exhibits should meet visitor expectations for several aspects of the exhibition experience. These aspects include educational experiences, entertaining experiences, and social experiences.

- Exhibits should be designed to be accessible and easy to use so that visitors understand how to use the exhibit, feel directly engaged with the exhibit, can draw on knowledge from both outside and within the exhibit to interact with it, and find it easy to begin again after erring.

(2)   Information and objects should be presented in a way that provides visitors engaging experiences. They should not be presented as exhibits for the sake of exhibits, but in a purposeful manner that nevertheless does not compromise the integrity of the knowledge (sometimes gained through research) or of the objects. Visitors can have a dialogue with the exhibit, affect the exhibit and have it affect them, and feel successful in this interaction. For example:

- The "why should I care?" should be clear throughout.

- The emotional impact of an exhibition should sharpen understanding.

- Exhibitions should offer visitors choices, feedback, and indicators of success that personalize the visit for them. Design should build in "natural" goals and indications of success along with multiple inquiry paths, layered experiences and text, and opportunities to manipulate variables of the exhibit with clearly observable results.

- Exhibitors should support direct experiences in the exhibition with labels, staff explainers, and opportunities for cooperative engagement. This could mean providing facilitated activities, discovery carts, raising questions in texts, and physically designing exhibits for multiple participants.

- There should be support for follow-up educational experiences, such as resource rooms, web pages, outreach programs, and volunteer opportunities.

- The exhibition should reach out to visitors to engage them with the message.

- The exhibition should surprise and inspire visitors.

- Exhibits should aim to create a "flow experience" where visitors feel fully engaged and are enjoying themselves.

- A variety of experiences to match a range of abilities and skills should be provided as visitors want to succeed.

- Beyond being engaged, visitors should find themselves involved in immediate and long-lasting ways.

- Visitors should feel intellectually competent. Competence is a cognitive comfort that goes beyond accessibility.

- Exhibits should present real and genuine objects and phenomenon that provide for intellectually and emotionally involving experiences. This can mean including rare objects, such as one of a kind artworks or artifacts from an ancient civilization, or allowing for interaction with unusual physical phenomenon, as can be found in immersive environments.

- The space should be used as an evolving repository of knowledge.

(3)   Messages should be communicated in a clear, coherent manner and through multiple media. An exhibition should allow for differing viewpoints on a subject. Visitor engagement is facilitated by the interpretative and communication strategies that support the messages of the exhibition and their relevance to the visitor. For example:

- Information should be presented in multiple formats, and decisions should be based on the intended audience.

- Messages should be clear and coherent and efforts are made to make the subject matter come alive through attractive presentation and opportunities for establishing personal connections and meaning.

- The exhibition program should include interactive installations, open air displays and education exhibitions, and utilize multimedia techniques.

- Communication strategies that are clear, appealing, relevant, and engaging should be developed.

- Texts and other communication media should be accurate, honest, and clear, yet allow and present differing points of view.

Outreach

Traveling exhibitions, educational programming and other methods of outreach are other areas in which museums are setting standards for themselves that directly relate to their audiences. Questacon, The National Science and Technology Centre in Australia set a standard for itself that requires taking programs to every state and territory at least once every two years.

The AAM Standing Professional Committee on Education (EdCom) developed working standards for museum education that "reflect the complexity of engaging a diverse audience in vital and meaningful learning experiences." They include, but are not limited to:

- Focus on audiences and community. Museum educators have knowledge of and respect for the audiences their museums serve. They promote museums' public service role within our changing society.

- Diversity of perspectives. Museum educators use interpretive practices that acknowledge the variety of cultural, scientific, and aesthetic points of view that contribute to visitors' understanding. They create opportunities that enable informed viewpoints to receive judicious consideration.

Monitoring and Evaluation

Though museums are beginning to subscribe to and adopt standards of product excellence (predominately, the desired benefits of visitor experience), few have gone to the next step of measuring performance to see if, in fact, standards of excellence are being met. There are very few published methodologies for regular and strategic monitoring and evaluation of museums in the area of exhibits and how they meet the standards they set for themselves. Measurement of standards receives the most attention from museum accreditation/registration schemes and museum strategic plans, where professionals monitor and rate the performance of organizations.

One way to evaluate performance is to listen to visitors and other users of the museum. The American Association of State and Local History (AASLH), in collaboration with the Center for Non-Profit Management, is conducting a pilot project on performance measurement with ten history museums/historical societies. The key instrument is a self-administered visitor survey consisting of demographic items and 25 statements to be rated on an 11-point scale anchored by "strongly disagree" and "strongly agree." Designed to measure several aspects of the visitor experience, statements include "Visiting the Center has had a very positive impact on me" and "I always trust the information that the Center provides in its programs/exhibits."

In the exposition drafted by Beverly Serrell and the Excellence Judges, independent reviewers serve as proxy visitors and score exhibitions on several criteria. Serrell reports that the "diversity of opinions [in a test run for eight exhibitions by eight judges] reflects the nature of criticism and how it is influenced by personal, idiosyncratic vantage points even when the judges used the same set of criteria. Whether the criteria can be honed to the point that there will be greater agreement on what exactly the criteria are meant to measure remains to be seen."

HYBRID STANDARDS

The Ministry of Tourism, Culture and Recreation of Ontario, Canada released a thorough document to guide its museums in all aspects of operation that highlights the interconnectedness of internally focused and externally focused standards. The *Standards for Community Museums in Ontario* (August 2000) includes an Exhibition Standard requiring: written exhibition policies; a varied exhibition schedule (permanent and temporary); relevant, accurate, and effective communication; skilled and trained staff; safety for visitors and staff; accessibility for all; effective promotion of learning and enjoyment; annual budget allocations to the exhibition program; and preservation and care of artifacts that are prepared for and displayed in exhibits. The standards deal with a more comprehensive range of considerations than most other standards solely for exhibitions, and they are aimed at meeting both internal and external expectations. The Ministry also publishes "practical information on operating a community museum" in the form of Museum Notes. One such note, *Developing an Exhibition Policy for the Museum*, provides a "framework for producing consistently excellent exhibitions." It encourages museums to establish policy that considers the role of several elements in the success of an exhibition. These elements include theme, space, illumination, furniture, graphics, work areas, duration, programming, human resources, and financial resources.

In the areas of exhibition design and content, a museum's ability to address external interests and needs is very much tied up in its ability to effectively perform internal functions. Evaluation, collections, and education and interpretation merit additional discussion as hybrid types of standards because they show how, in excellent exhibitions, process and product are undeniably bound to one another.

Design

Exhibition design not only supports the meaning of the exhibition, but also has an inherent meaning or creates meaning in and of itself. Design also aids visitor navigation and understanding of the space and its contents. For example:

- Elements and spatial organization of an exhibition should support and contribute to its ideas and tone. Materials used and the quality should be appropriate to the exhibition's design concept, audiences, duration, and budget.

- The visual and spatial forms should make new meaning.

- The exhibition path itself should have meaning.

- The 4-D relationships should underscore meaning.

- The design of the exhibition should include accessible, attractive, inviting, and involving environments in both physical and intellectual terms.

Content

The content of the exhibition is appropriate to and supported by the exhibition format and is well structured and accurate. For example:

- The subject should be appropriate to an exhibition format, accurate and current, encourage interest, be adequately supported by the objects, the multimedia, and interactive components (if any) and the integrity of the presentation.

- The content should be well structured, beautiful, moving, elegant, and supported by evidence.

- Layers of meaning should be revealed if visitors try.

- The program should include exhibitions that tackle both controversial and contemporary issues that relate to the museum's themes.

Evaluation

Museums should use evaluation as a means to improve the relevance, functionality, and effectiveness of exhibits. There should be mechanisms for feedback from the visitor to the museum regarding various aspects of the exhibition at multiple stages of an exhibition's life. For example:

- The Exhibitions Coordinator, in consultation with the Programming Committee, should implement systems for the evaluation of all exhibitions undertaken by the museum. These include project team evaluation, visitor evaluation, museum staff evaluation and design evaluation.

- Designers should evaluate, through front-end, formative, and/or summative methods, to improve the relevance, functionality, and effectiveness of exhibits.

- Exhibitions should be evaluated on both intellectual and practical levels.

Museums communicate their desire to hear from visitors with statements such as:

- We value and welcome your feedback and will respond to comments and suggestions within seven working days.

- We will ask users what they think of our services, and will use the answers to improve services.

- We will provide a simple and effective complaints procedure, designed to solve problems promptly, and to improve our services.

- We will acknowledge and respond, where possible within five working days, to your input, comment, complaint or suggestion.

- We will deal promptly and courteously with all enquiries, requests, correspondence and complaints.

- We will provide prompt, efficient and accurate responses to enquiries.

Collections

Not only do museums need to preserve their collections as assets, but they need to assure the public that, through excellent stewardship, artifacts held in the public trust are safe and sound. The presence of collections stewardship in charters reinforces that quality that distinguishes museums from other cultural organizations and entertainment venues. For example:

- We will provide excellent care for the National Collections.

- We will live up to our reputation as a museum of international importance, in the way that we care for, display and explain our collections.

- We will foster the care and research of Australia's cultural and material maritime heritage, in particular the National Maritime Collection.

- We will continue a strong commitment to caring for objects in the collection and on loan to us.

Education and Interpretation

Learning-oriented goals are truly achieved when people with specialty knowledge work together to increase the public's access to the museum. Two groups have examined excellence in this area.

The EdCom Museum Education Standards and Principles "stress that interdepartmental teamwork helps museums fulfill their educational mission; the responsible use of new technologies; an emphasis on rigorous planning, implementation, and assessment; and the importance of public advocacy to the future stability and strength of museums."

The AAM National Interpretation Project identified three general characteristics of exemplary interpretation (the activities through which a museum carries out its mission and educational role) that speak to both the process and product. The first characteristic, "strategy and content," means a museum has a statement of purpose for the interpretation, engages in effective planning, has broadly stated values, takes its educational role seriously, and involves the community while demonstrating knowledge of the subject, making content relevant, and engaging in important issues. The second characteristic, "enabling factors," means a museum has prepared itself through internal commitment to the interpretive philosophy, employing learning theory, research, and evaluation, and creating a continuous relationship with its audiences. The last characteristic, "access and delivery," means a museum provides multiple and varied entry points, uses inviting design, bridges the gap between audience and content, expresses clear ideas that are apparent to the audience, and uses media that are appropriate to the exhibition's goals, content, and audience.

CONCLUSION

It is clear that museums need both process and product standards in order to keep their organizations healthy and balanced in their activities and performance. Further, guidelines and standards already established for collections, research, and museum management can inform the development of standards for exhibitions so that seemingly separate operational areas can work to support one another and the museum as a whole.

The exhibition standards and guidelines presented in this paper are not prescriptive; rather they are general indicators of quality and excellence, as defined by the authors, that support the mission and vision of a variety of museums. Specific guidelines are useful at the department level, where text is written, cases are built, and walls are put in place. Such standards for exhibition components help to establish the brand of the organization and control for quality in systematic ways. The creative and innovative synthesis of such standards can lead the museum to present an exemplary program of exhibitions that ensures accountability to visitors, the public, funders, and other museum constituents.

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