

***Exhibition Development and Implementation:
Five Case Studies***

August 2002



Smithsonian Institution

Office of Policy and Analysis
Washington, DC 20560-0405

***Exhibition Development and Implementation:
Five Case Studies***

August 2002

 Smithsonian Institution

Office of Policy and Analysis
1000 Jefferson Drive
Room 113
Washington, DC 20560-0039

TABLE OF CONTENTS

FOREWORD	iii
INTRODUCTION.....	1
CASE I: <i>FAST ATTACKS AND BOOMERS: SUBMARINES IN THE COLD WAR</i>	3
CASE II: <i>VIKINGS: THE NORTH ATLANTIC SAGA</i>	17
CASE III: <i>SANTOS: SUBSTANCE AND SOUL</i>	40
CASE IV: <i>BUCCELLATI: ART IN GOLD, SILVER, AND GEMS</i>	47
CASE V: <i>FOUNTAINS OF LIGHT: ISLAMIC METALWORK FROM THE NUHAD ES-SAID COLLECTION</i>	56

Foreword

The use of case studies as a tool for better understanding exhibitions is relatively new in the museum field, although cases have been the core of study in a number of other fields including cultural anthropology, law, and sociology. This initial attempt to produce case studies on five Smithsonian exhibitions was aimed at increasing the Office of Policy and Analysis' (OP&A) knowledge of the variety, unique character, and diverse managerial approaches of exhibitions at the Smithsonian.

Readers will note that OP&A has not interpreted, analyzed the cases, or compared them to each other. However, the cases demonstrate that exhibits take place in different contexts even within a single museum and that their similarities are perhaps less important than their differences. The cases illustrate the dangers of generalizing about the purposes of exhibitions, management of exhibitions, attitudes of staff, and leadership. I am surmising that many readers are thinking that OP&A is merely re-stating the obvious. However, sharing some of the background materials, such as these case studies, that OP&A is considering in preparing our forthcoming report on exhibitions may benefit some readers who are less familiar with certain aspects of exhibit making than with others.

Zahava D. Doering conducted the interviews for each of the cases and wrote this report. She was assisted in the data collection by former staff member Abby Sharbaugh, and two capable OP&A interns, Courtney Price and Sophia Paulik. OP&A staff, Andrew J. Pekarik, Whitney Watriss and Kerry DiGiacomo, as well as museum staff that worked on each of the exhibitions reviewed the cases. I am indebted to all of them for giving their time, energy and suggestions while working concurrently on many other projects.

Carole M. P. Neves, Director
Office of Policy and Analysis

Introduction

These case studies are based on interviews with about 50 Smithsonian staff members and a dozen non-Smithsonian professionals who were involved with the five case-study exhibitions. They include project managers, curators, designers, fund-raisers, exhibition department managers, educators, contractors, and other personnel. The study also relies on materials assembled in the course of interviews (e.g., proposals, correspondence, budgets). The text of each study is followed by a timeline of the exhibition development process (Attachment A) and a list of exhibition-related activities, such as public programs, films, and presentations, as well as publications, and selected news articles and reviews (Attachment B).

The reader should recognize the limitations of this study. Different levels of information and varying levels of detail were available for each of the exhibitions. Budget categories, tracking systems and other management tools are not standardized across museums and consequently difficult to describe using common terminology. Smithsonian staff was generous with their time and their materials and fully cooperated with us. At the same time, post-project debriefings are not part of the Smithsonian culture, and there was some reluctance to re-visit past work.

The exhibitions that were included were time-limited, short-term installations, rather than long-term installations or re-installations. The exhibition with the shortest schedule was on view for sixteen weeks; two are scheduled for three years. Four of the five exhibitions discussed in this report were on view at the time the case studies were first considered, in the fall 2000; one had closed several months earlier. One exhibition closed after traveling to two non-Smithsonian venues; another is still on the road and will close after traveling to six locations next spring. In selecting the exhibitions, we considered characteristics such as their currency, subject matter diversity, and differences in size, type of installation, and venue. The exhibitions, their venues, and schedules are listed below:

Fast Attacks and Boomers: Submarines in the Cold War (Boomers), National Museum of American History, April 12, 2000 – April 2003.

Vikings: The North Atlantic Saga (Vikings), National Museum of Natural History, April 29, 2000 - August 13, 2000.

Santos: Substance and Soul (Santos), Arts and Industries Building, September 17, 2000
- March 31, 2001.

Buccellati: Art in Gold, Silver, and Gems, National Museum of Natural History,
October 21, 2000 -February 25, 2001.

Fountains of Light: Islamic Metalwork from the Nuhad Es-Said Collection (Fountains),
Arthur M. Sackler Gallery, 17 September 2000 – September 2003.

CASE I.

Fast Attacks and Boomers: Submarines in the Cold War

Introduction

A visitor to the home page of the *Fast Attacks and Boomers: Submarines in the Cold War* virtual exhibition [americanhistory.si.edu/subs/index.html] has options for viewing the various exhibition sections. On the right hand side of the screen is a button for “Angles and Dangles.” It promises a behind-the-scenes look at the exhibition and the people who made it. According to the next screen:

“Angles and Dangles” is a submariners’ term for a critical exercise that usually takes place right after a nuclear submarine leaves on a patrol. Once in deep water, the sub dives deep and then comes back up, both at a steep angle. Anything that is not properly secured will fall down, making some noise. These are known as dangles, and they must be corrected before a sub is fully rigged for silent running. Basically, you dive deep, come up steep, and listen to the result.

Here are some behind-the-scenes stories, or particular “angles” by the curatorial staff, that for one reason or another did not make it into the exhibit. Some represent intensive research that was ultimately eliminated for reasons of limited space or time; these are the dangles. Others are personal stories of our research and exhibit experiences.

The behind-the-scenes story told in this paper is not as exciting as the stories on “Angles and Dangles.” It may, however, shed additional light on the exhibition and those who developed it.

Exhibition Description

Fast Attacks and Boomers: Submarines in the Cold War (Boomers), a 3,200 square-foot exhibition at the National Museum of American History (NMAH), opened on April 12, 2000 for a three-year period. The exhibition marks the centennial of the U.S. Navy’s Submarine Force. The exhibition describes the role played by U.S. submarines in America’s Cold War strategy from 1945 to 1991, in response to the tension between the

United States and the Soviet Union. The two types of nuclear submarines are: “Fast Attacks,” designed primarily to locate and track enemy submarines, and “Boomers” (fleet ballistic submarines), equipped to carry long-range nuclear ballistic missiles.

The exhibition contains once-classified equipment and other objects from decommissioned submarines.¹ Artifacts include a maneuvering room and sonar consoles, an attack center complete with two periscopes, and crew dining and bunking areas. A photographic timeline, video dramatizations (including a video narrated by Walter Cronkite),² models, interactives, memorabilia, and a section on submarine families ashore complete the exhibition.

Exhibition Origin

In January 1998, several retired submariner flag officers contacted Vice Admiral Donald D. Engen, the late director of the National Air and Space Museum. They came to advise him that the Naval Submarine League (NSL), a professional organization for submariners and submarine advocates, was interested in a celebratory exhibition marking the centennial of a submarine joining the U.S. Navy. The director, in turn, called the director at the NMAH and “opened the door” for the Navy.

Navy staff officers and members of the NSL briefed the director and senior staff members of NMAH. They informed them that the NSL would assume responsibility for funding the exhibition. At the meeting, both the NMAH and Navy expressed concern that the presentation of nuclear weapons and their delivery systems (i.e., submarines) in the exhibition might risk a public response similar to the response to *Enola Gay* in 1994-95. NMAH was more concerned about NSL’s ability to raise funds, as well as the museum’s ability to shape the exhibition to fit the museum’s programmatic goals, i.e. American identity and 20th century collecting. Upon leaving, the NSL “took a deep breath and waited” for a response.

In the first week of February 1998, three weeks after the initial NMAH briefing, NSL received a letter of interest from NMAH. Two years and two months later, on April 12, 2000, *Boomers* opened to the public. (A timeline is in Attachment A.)

In celebrating the submarine centennial, the U.S. Navy recognized “the enormous contributions of both American submariners and those involved with building and supporting our innovative submarines since the dawn of this century.” The Navy in

¹ The equipment and objects were declassified specifically for the exhibition.

² He was selected because staff considered him the “voice of the Cold War period.”

cooperation with many organizations (e.g., the NSL) planned events throughout the country and viewed an exhibition on the Mall as a critical element of the celebration. Several staff believed that part of NSL's motive behind installing this exhibit at the Smithsonian was to gain greater visibility and public appreciation for submarines in an effort to help sustain the Navy budget. The Navy liked having the opportunity to bring people down to see an exhibition and corporations in the submarine industry liked the "advertising" potential. Both of these groups supported the idea. They recognized that this type of visibility would have been unattainable at an alternative venue (e.g., the Naval Historical Center in Washington's Navy Yard).

From the museum's perspective, NMAH was "long overdue for a Cold War exhibition," and NSL's unexpected proposal for the museum to host *Boomers* fit this need. After meeting with the Navy, the NMAH team limited the exhibition to the Cold War period; the Naval Historical Center covered the earlier history in an independent exhibition. The proposed exhibition, according to one senior staff member, would be a good way to "update the Armed Forces Hall and reduce the 20th century gap" (i.e., lack of materials in the latter half of 20th century). The prospect of adding to the collection was a further incentive. As of this writing, only a couple of uniforms and the submarine models from *Boomers* have become part of NMAH's permanent collections, as the majority of the objects are on loan from the Navy. At the time of the interviews, opinions were divided on the appropriate final disposition of the artifacts. In general, some staff favored collecting only objects related to the people involved in the submarine story, while others wanted to collect the equipment. The contract for *Boomers* called for a three-year exhibition, although the unwritten assumption on both sides was that it would be semi-permanent. How this exhibition, or any part of it, fits into the developing plans for a refurbished museum remains unclear.

Approval Process

In talking about *Boomers*, one discussant noted that the proposal never went through the museum's Exhibits and Programs Committee (EPC) or any formal approval process; basically, "it was just decided among a handful of key players and announced at a staff meeting." According to staff members, increasingly at NMAH senior staff approve exhibitions and the subsequent EPC review addresses the framework for exhibitions rather than the ideas themselves. An official exhibit proposal was prepared in August 1998. The proposal was easily approved by the EPC because by that time *Boomers* was already far into conceptual and design development and everyone knew there would be money to back it.

Funding, Budget and Cost

The exhibition arrived with a commitment of full funding from the NSL. Full funding included contractor costs for design and production and NMAH personnel costs for staff augmentation necessitated by the exhibition. The staff were two term appointments, a graphic researcher and a project manager. These funds were also for advertising, special materials (e.g., brochures, posters, banners, Metro back-lit posters) and exhibition maintenance.

The NSL was raising funds for the submarine program's centennial celebration and *Boomers* was one of the funded projects. Individuals and corporations who are recognized on the acknowledgements panel in *Boomers* gave at least \$10,000 either to the Centennial Celebration or directly to the exhibition.

The financial arrangements between NSL and NMAH were somewhat unusual. Both organizations knew from the start that design and production for the exhibition would have to be contracted. The museum did not have the in-house capabilities to support this exhibition. In view of the short time frame, NSL looked for a way to circumvent SI's lengthy contracting process.

Going through the usual bidding and contracting process, even starting immediately in early 1998, would put at risk opening the exhibition in early 2000, i.e. during the centennial. NMAH staff estimated that even 'fast track' Smithsonian contracting would take at least six-months. To save primarily time but also money, NSL contracted for design and production independently and paid the firm approximately \$2 million. Contracting outside the Smithsonian process also allowed for a design/build contract, contrary to Smithsonian Office of Contracting (OCon) practices. OCon, at that time, insisted on separate contracts for design and production. The Smithsonian administrative fee was not a major factor. The project was 'grandfathered' at the 3% rather than the 10% rate that was established during the negotiation period.

The timing of the formal agreement between NMAH and NSL suggests that the *Boomers* exhibition team proceeded on faith, confident that the NSL would provide the necessary funding. An agreement was entered into by and between the Naval Submarine League and the Smithsonian Institution in early July 1999, one week after the approval of Phase II of the design (60%). The agreement stated that NSL would contract directly with the design and production firm while NMAH retained intellectual control and oversight. As noted above, NSL gave NMAH \$550,000 for in-house staff augmentation, exhibition-related promotional costs, and maintenance. NSL was ready to deposit an initial check

before the agreement was signed. However, the museum determined that it was inappropriate. All the funds were deposited by September 1. Along with the team, the design and production firm was able to work on design while the agreement was in process. The firm was able to work before the formal agreement since NSL was paying them directly.

Organizational Structure and Responsibility

The organizational structure of *Boomers* was straightforward. The project team resided within the Division of History and Technology; it consisted of a project manager, project director/lead curator and two co-curators, and three individuals who performed some research, assisted with graphics, and were responsible for object registration.³ Outside the museum, the NSL representative worked closely with the Naval Historical Center (the conduit for objects), several technical advisors identified by NSL, and an NSL advisory board.

NSL's decision to fund the design and production 'outside' Smithsonian channels and the exhibition's heavy reliance on artifacts that belonged to the Navy necessitated client (NSL) involvement in the day-to-day project management. A retired Navy captain was asked by the NSL to "lead the effort" and acted as the NSL centennial project representative. When first offered the assignment, in February 1998, he thought, "sure, it shouldn't be too bad." Within weeks he met with the associate director for curatorial affairs and the department chair. In his words, "these two men reoriented me to what my mission would be," or, "rather, what the goal would be: open on time." As to schedule, they told him, "you're a year to a year and a half behind."

In spite of the relatively short time between idea and exhibition opening, the *Boomers* team did not have NMAH staff continuity and involved some inexperienced staff. The first project director stepped aside to undertake curatorial duties as co-curator. The other co-curator was on the NMAH payroll for three months prior to *Boomer's* approval. Before coming to NMAH, he had no experience with exhibitions or the presentation of technical material to a general audience. The assistant chair of the museum's Division of History of Technology started working on the exhibition as deputy project director but was on leave for part of the time and left some of the logistics to be handled by others.

³ According to staff, the project director is responsible for "intellectual oversight" of the exhibition, e.g. to ensure that it stays within scope and the museum's mission. The project manager has "administrative oversight" of the exhibition, e.g., monitoring the schedule, costs, deliverables, etc.

The project manager retired in February 1999 and accepted a part-time appointment, paid from the project funds, to complete the project. “I felt a loyalty to the project because of my life as a submarine wife. I was part of my husband’s submarine career for more than 30 years.” Some people who were interviewed viewed the project manager’s Navy links as a potential conflict of interest. They believed that her appointment as project manager was a way of disassociating the exhibition from NMAH and embracing the Navy’s positions. Others perceived no conflict. In fact, they felt she did a fine job of recognizing both positive and negative aspects of the Navy and translating the museum and Navy cultures to each other.

In the planning and development of *Boomers*, the museum’s education office played a marginal role. Museum educators were not involved until quite late in the process. Several reasons may explain this. The fast-paced schedule may have precluded earlier or more substantive involvement. Since the exhibition was approved with the understanding that “no resources outside the Division of the History of Technology would be used” (i.e., minimal museum support), exhibition team members may have felt constrained in approaching the education office.

Approximately 80% of the exhibition process was complete by the time educators entered the picture. Consequently, there is no educational package or other ancillary materials to go with *Boomers*. The education office offered suggestions for hands-on activities for *Boomers*, but they were rejected. Instead, the exhibition team suggested that these activities be placed in the *Hands on Science Center*. In January 2000, four months before opening, the team did ask the education office to recruit and train docents for the exhibition; at this stage, it was too late. While exhibition team members attribute this to unresponsiveness and marginal interest on the part of the education department, others cite a lack of resources as the main reason. As early as the initial planning meetings in May 1998, the NSL representative thought that having former submariners as docents at peak visitation times would prove to be a good approach. The interactive approach with both people and machines is, as he put it, “a proven winner in the NMAH.”

The education office became involved with *Boomers* as part of the 410 Accessibility review. NMAH educators described accessibility issues as the strongest tool that they have with which to influence exhibitions, since an accessibility review and approval is required. One exhibition team member felt that the design of the exhibition was seriously constrained by the Smithsonian interpretation of the Americans for Disability Act (ADA) requirements. “ADA’s word is taken as the final word without question,” and several interesting ideas were turned down. For example, a suggestion was made and rejected that the exhibition should include a Naval Sonar trainer/simulator ride.

Concept and Design Development

The exhibition outlined in the August 1998 proposal, as officially approved at NMAH, was similar to the original concept proposed to the museum by NSL. The major exception was a curatorial suggestion to bring forward the Cold War angle of *Boomers* and to focus on nuclear submarines; doing so would provide for a transition from the Armed Forces Hall at the museum to the post-World War II era. This direction is consistent with one of the co-curator's earlier research in the history of America's nuclear development. The NSL had no problem with this suggestion. More generally, as it affected the exhibition content, NSL was "respectful of NMAH and the museum's right to have the final say."

Within days of getting the museum's official approval, the NMAH project team, NSL representative and the design and production firm held a series of design meetings. In these meetings, they decided on three foci: timeline, technological stories, and life on board. According to one participant, the attendees at the meetings also agreed that the exhibit would be designed as a possible permanent exhibit and that the NMAH team would produce a preliminary script outline. (Although the contract with NSL called for three-years, NMAH staff was hoping to integrate most of the exhibition into the Armed Forces Hall.)⁴

Earlier in the summer (June 1998), the NMAH project manager and the NSL representative worked out the arrangements for obtaining exhibition objects through the Washington-based Naval Historical Center (NHC). Objects would come from decommissioned submarines as they were being dismantled. The curator at the NHC "worked out a deal" with the Navy organization that requests items (the Naval Sea Systems Command (NSSC)). In practice, the exhibition team requested artifacts through the NHC; NHC then requested specific items from the NSSC. NSSC could authorize a shipyard to dismantle a submarine. Fortunately, the *USS Trepang* (Fast Attack) was decommissioned on a schedule that fit the exhibition requirements and was the source for most of the requested parts.

By early November 1998, the official request for equipment from the *USS Trepang*, compiled by the exhibition team, was sent to the NSSC through NHC.

The *USS Trepang* arrived at the Puget Sound Naval Shipyard in late 1998 from Groton, CT. The shipyard was expecting it and "the men began off-loading stuff that was earmarked." The objects were being sent to the NHC, the repository for the items that

⁴ This was before the current plans to reinstall the whole hall were made.

come off the submarines. Since it was a “Navy to Navy” transfer, there were funds in the NHC budget for shipping via Navy channels. Instead of being sent to the Navy Yard, objects were shipped directly to the design and production firm where they were readied for installation.

In December 1998, the design and production contractor submitted the Phase I (30%) Design Plan drawings; the review and approval by both NSL and NMAH were completed by late January. By mid-February, Phase II (60%) started and, within a month, draft copy of text (panels/labels, etc.), graphics, and a near final artifact list were approved. By late October 1999, Phase III (90%) was completed; the design was completed and approved and NMAH submitted a completed script to the contractor.

According to several NMAH staff members, the development process was relatively smooth. However, there were two areas of tension between NSL and the NMAH exhibit team. The first related to the cost of designing and building submarines. NSL did not want the cost to be made public in this exhibition, while the curatorial team insisted that it be included. In the end, the cost was displayed. The second area related to a suggestion from NMAH staff to include a discussion of the role of women on submarines. The team decided not to include this topic, because it was tangential to the main story.

Fabrication and Installation

In late summer/early fall 1999, submarine pieces began to arrive at the contractor’s facility. The NHC curator and an exhibition team member from NMAH spent one day each week cataloguing objects. Increasingly, they had to spend more than one day each week “as things began to arrive in droves. Mass shipments (bigger things) came last. It became a ‘massive project’.” As soon as artifacts were catalogued, the contractor began preparing them for the exhibition.

According to NMAH participants, because objects are on loan from the Navy, some display-related dilemmas arose in the course of preparing objects for display. For example, the bar on the maneuvering room console that is now on display is not the original. The original was beaten-up by servicemen who, overcome with boredom, used tools (such as wrenches) and rings on their hands to sound a beat on the bar. The Maneuvering Room Council (Navy) members wanted to replace the original grab bar in the diorama because of its worn-out condition. In the end, the Navy replaced the original bar with one in better condition from another decommissioned submarine. NMAH’s interest in showing the public how things really look at the end of a submarine’s commission was somewhat at opposition with the Navy’s desire to show their pride in the

maintenance of equipment. In the end, the NMAH had no choice, as it was an object that belonged to the Navy.

By early December 1999, the final draft of the exhibition script was approved and the shop drawings were complete. NMAH then cleared the space so that installation could begin. Installation began in early February and was completed on April 12. The exhibition opened “two days early and slightly under budget.”

Marketing and Promotion

As general practice, the public affairs office at NMAH develops a public relations plan for each exhibition and works with the curators and other team members to refine it. The office was brought into *Boomers* about a year before the opening. Working with a Naval staff member in charge of public affairs for the centennial celebration (including *Boomers*), the core team and curators were prepared to interact with the media. They had a workshop for media training and a session with TV and microphones so they could practice speaking in public and see themselves on monitors. The press preview was scheduled, one year in advance, for April 11, 2000, to coincide with the first submarine’s 100th anniversary. Several interviewees felt that public relations activities should have started earlier. Since the NSL was deeply invested in high visibility, it actively participated in public relations and marketing.

A number of external events led to poor attendance at the press preview. A press event was scheduled at the zoo at which the Secretary would announce the coming of the pandas. NMAH was not able to convince the central public affairs office to reschedule, even though NMAH had scheduled the conference a year in advance and reporters were flying in from New York. As a result, every local TV station and newspaper went to the zoo.

The day of the NMAH press briefing, an Osprey helicopter crashed in Arizona, killing a number of servicemen. Consequently, although NMAH had expected a good attendance from the military press, only Navy reporters attended. The opening also coincided with protests against the World Bank and International Monetary Fund, and Elian Gonzalez, a Cuban child with a contested status in the United States, was still in the news. In sum, *Boomers* got little national media attention when it opened.

Activities Related to the Exhibition

Several interviewees expressed concern about the lack of a catalogue for the exhibition. One curator was told that NMAH doesn't really publish catalogues with many exhibitions anymore. Another noted that no one suggested a catalogue and when it came up, it was too late to produce in time for the opening. The dearth of original research on NMAH's part in planning this exhibition was also suggested as a reason. One curator saw *Boomers'* extensive website as serving the same role as catalogues used to.

The main activities connected with the exhibition, as detailed in Attachment B, have been public and private tours.

Assessment

NMAH staff and Navy personnel involved in the exhibition suggested that good project management and teamwork were responsible for the exhibition's timely completion. There was clear communication between the NMAH project manager, the NSL liaison, and the NMAH curatorial/research staff. Because of the funding arrangements, the design and production firm was responsible to the NSL. However, NMAH was kept well informed. In the words of one NMAH staff member, "There was value in Navy discipline and the project's relative isolation within the museum."

As part of the study of *Boomers*, in October 2000, the Office of Policy & Analysis (OP&A) conducted a study of exhibition visitors.⁵ The study showed that visitors regarded *Boomers* as an interesting exhibition, one that provided educational experiences and included engaging objects (e.g., the 'Life Aboard' diorama). Overall exhibition ratings were not especially high. Only one in seven exhibition visitors rated the exhibition a "must see."

The planning of *Boomers* did not include input from museum visitors. In March 1999, about a year before opening, an informal title study was conducted. However, the final exhibition name was selected independently of the results. The OP&A study showed that the title and its graphics communicated a different focus to entering visitors than was reported by exiting visitors. The title, subtitle, and graphics did not emphasize the dimensions of the exhibition that visitors found most prominent (e.g., the human experience and the vital roles of submarines). Few museum visitors expected the exhibition to be primarily about the Cold War.

⁵ The study is reported in *A Visitor Study of Fast Attacks and Boomers: Submarines in the Cold War* available on <http://www.si.edu/opanda>

Planning for the exhibition did include input from a broad representation of the submarine and military history community. In April 1999, the NSL representative created an Advisory Committee, to “have everyone speak their piece.” The Committee was a forum for discussing the overall rationale of the exhibition. It gave NSL and NMAH a chance to explain why the exhibition was not a traditional 100-year history of submarines. Rather it promoted the view that this exhibition “wasn’t about the early history; it’s about the Cold War; it never got its spotlight before.”

ATTACHMENT A.

TIMELINE SUMMARY BY KEY STAGES: *BOOMERS*

IDEA AND ACCEPTANCE (2 MONTHS)

- Idea for exhibition, with full funding, is proposed to NMAH by the Navy Submarine League (NSL) (January 1998)
- NMAH accepts idea (February 1998)

PROPOSAL, CONCEPT & DESIGN DEVELOPMENT (20 MONTHS)

- Exhibition planning meetings begin (March 1998)
- Official start of design and production contract with NSL (July 1998)
- Exhibition proposal approved internally at NMAH (August 1998)
- Preliminary script completed by NMAH (September 1998)
- Phase I (30%) completed and approved by NSL/NMAH (February 1999)
- Phase II (60%) completed and approved (July 1999)
- Agreement between NSL and Smithsonian approved (July 1999)
- Phase III (90%) completed and approved (October 1999)
- Final draft of script completed (December 1999)

COLLECTION DEVELOPMENT, FABRICATION AND INSTALLATION [TOTAL OF 20 MONTHS, SIMULTANEOUS WITH DEVELOPMENT, 16 MONTHS]

- Preliminary list of artifacts requested from the Navy Historical Center (NHC) (August 1998)
- Official comprehensive list of artifacts sent to NHC (November 1998)
- Process of dismantling submarine for parts begins (January 1999)
- Artifacts begin arriving from the Navy (August/September 1999)
- Gallery clear and installation begins (February 2000)
- Exhibition opens two days early and slightly under budget (April 12, 2000)

POST-OPENING

- Last submarine team meeting (April 2000)
- OP&A visitor study (October 2000)

ATTACHMENT B.

EXHIBITION RELATED ACTIVITIES: *BOOMERS*

SPECIAL VISITORS' TOURS AND EVENTS

- Assistant Director of Greenwich Maritime Museum (U.K.)
- Commander, Atlantic Submarine Force, VADM E. Giambastiani, USN and staff members from Norfolk, VA.
- Conference of Maritime Museum Directors and Curators during Annapolis convention
- Corporate officers from corporate sponsors for the exhibit (ongoing)
- General Joe Foss & 13 family/friends
- Iona Senior Services Men's Club
- Montenegro Ambassador
- National Director of the Navy League of the U.S.
- National Oceanic and Atmospheric Administration (NOAA) staff
- National Park Service staff
- National Transportation Safety Board members (during investigation of the *USS Greenville* collision)
- Naval Historical Center staff
- Navy staffs from Washington, DC commands, senior members including two former Chiefs of Naval Operations (CNO)
- Navy's Strategic Systems Department special staff outing
- Newport (RI) Navy personnel
- NMAH donors, Mr. And Mrs. Guenther Sommer
- ROTC groups
- Russian submariners & US Naval Intelligence personnel
- Sen. Howard Baker
- Senior Naval officers and civilians from UK Ministry of Defense (July 2002)
- Senior staff from National Imagery and Mapping Agency (NIMA)
- Smithsonian Young Benefactors
- St. Petersburg (Russia) Submariner Club officers led by RADM Lev Cheznavin (ret.)-former Commander of Soviet Atlantic Submarine Force

- Submarine Commanding Officers and former Commanding Officers with families (over 200 officers)
- Submarine Veterans Assoc from Tidewater area (VA)
- Submariners from the Naval Academy Class of 1957
- Swedish Chief of Naval Operations
- Swedish Navy personnel
- US Navy Diving & Environmental Physiology Group
- *USS Cincinnati* executive director and development staff
- *USS Clamagore* veterans and families during reunion (Oct 2002)
- *USS Flying Fish* (WWII submarine) veterans and families (during ship reunion)
- Washington Chapter of the Naval Intelligence Assoc. led by RADM S. Shapiro, USN (ret)

WEBSITES AND PUBLICATIONS:

- NMAH site, www.americanhistory.si.edu/subs has been advertised and “linked” by many official Navy websites as well as the various submarine veterans organizations.
- The various submarine “alumni” websites feature the exhibition and include visit information.
- Exhibition brochure, distributed to visitors, has had wide Navy distribution throughout the submarine community from Hawaii to CT, Naval Academy as well as corporate distribution. Presently distributing the “second printing” of 100,000 to visitors.

PUBLIC PROGRAMMING AND MEDIA

- PUBLIC TOURS (September 2000 through March 2002): 863 tours given, 6628 visitors
- Exhibition has been featured in a number of newspapers and magazines including the: *Washington Post*; *New London Day* (CT), Puget Sound Naval Shipyard paper (WA), Norfolk (VA) paper, *Naval Institute Proceedings*, *Navy’s Underwater Warfare* and *All Hands* magazines; *Naval Submarine League Review* as well as a number of periodicals from Navy and veteran groups.
- The exhibition has been shown in various History Channel documentaries on submarines including the mission of *USS Batfish*, depicted in one of the exhibit’s videos.

- Arlington Rotary Club slide presentation describing the exhibition and the effort to put it together.
 - Presentation to the Naval Academy Class of 1957 by the Project Manager.
 - Naval Academy Submarine Club makes regular visits to the exhibit.
 - Interview with the Project Manager and Technical Advisors by Military.com, a web-based newspaper on military subjects.
-
- Presentation to the Naval Academy Class of 1957 by Project Manager.
 - Naval Academy Submarine Club makes regular visits to the exhibition.
 - Interview with the Project Manager and Technical Advisors by Military.com, a web-based newspaper on military subjects.

Case II.

Vikings: The North American Saga

Introduction

Two years ago, for the fifteen weeks between April 29, 2000 and August 13, 2000, *Vikings: The North Atlantic Saga* was in the temporary exhibition gallery, adjacent to the museum's rotunda, at the National Museum of Natural History. According to museum staff, *Vikings* was one of the most popular temporary exhibitions in the museum's history; nearly 2 million visits were made to this exhibition. Since that time, 1.15 million visitors are reported to have seen the exhibition in New York City, Denver, Houston and Los Angeles. It is currently at the Canadian Museum of Civilization in Ottawa, and is scheduled to complete its tour in St. Paul, Minnesota next spring (May 2003).

The story of *Vikings*, which is presented here, starts with the origin of the idea by the Nordic Council of Ministers (NCM) and concludes with the start of the national tour. (A timeline is shown in Attachment A.)

Exhibition Description

Vikings: the North Atlantic Saga includes nearly 400 artifacts, dating from 800 C.E. to the present, including known treasures and recent archaeological discoveries from the Viking Age and the medieval period that followed. The exhibition brings together artifacts from Viking homelands in Scandinavia (Denmark, Norway and Sweden), as well as objects from Viking explorations and settlements in Canada, England, Finland, Greenland, Iceland, Scotland and the United States. The exhibition also includes reproductions of some objects that were integral to the story, but were too fragile to travel or unavailable, such as the Manx Cross, the Kensington Cross, and the Yale Vinland map.

The exhibition's story begins from the premise that the Vikings were an advanced culture of explorers, farmers, and fisherman who managed independently to explore, settle, and, survive in a remote and often difficult environment. They "set out from their European homelands for unknown places beyond the horizon, including North America, 1000 years ago." According to the senior curator, "It was our primary curatorial goal that this simple

narrative message - the Vikings came to North America after voyaging across the Atlantic - be clearly understood by our public.” Woven into the story are several themes that are intended to tie it together. One theme is “How do we know about the past?” Another essential theme is dispelling the myth of “Vikings as a stereotypical brutal warrior in horned helmets,” in the words of the lead curator. A third major theme is societal change and transition from pre-historic to historic, from pagan to Christian, and from rural economy to urban economy. A fourth theme is to show the environmental impact of the Norse on fragile North Atlantic environments.

A 10-minute introductory film provides visitors with information about the Vikings, such as who they were and where they lived. The exhibition includes sections describing the Vikings’ homelands, everyday life, and religion, as well as their looting and raiding forays. An audio-visual presentation of saga storytelling is presented in a structure evoking an Icelandic sod house. Several large murals illustrate events such as a Viking scene on the island of Lindesfarne, off England’s east coast, where in 793 C.E. a group of Norsemen attacked an unsuspecting 6th century monastery, and a church wedding in Greenland. A computer animation demonstrating the ship building techniques of the Vikings was displayed next to a boat model from Sweden’s Statens Historiska Museum.

At each of its venues, educational programs, films, lectures, scholarly symposia, and demonstrations accompany the exhibition. A representative selection of exhibition-related activities and media coverage is in Attachment B.

In addition, as is increasingly common with special exhibitions, a themed museum store accompanied the exhibition. This 930 sq. ft. museum store was prominently located to the right of the exhibition entryway.

Exhibition Origin

Vikings had its origins in the Nordic Council of Ministers (NCM), an organization representing Denmark, Finland, Iceland, Norway, and Sweden. NCM decided to encourage a Viking exhibition in North America during the millennium period (2000-2001) to mark the 1000-year anniversary of the Vikings’ arrival in North America. The NCM had internally discussed identifying a “strong partner” in North America who would be interested in undertaking the exhibition. It wanted someone with “a well-recognized name and the resources to help support it.” The NCM originally envisioned the exhibition primarily as an art and culture exhibition, similar to one undertaken by the Council in 1992.⁶ In the spring 1996, NCM pursued this idea more aggressively, with the

⁶ Roesdahl, Else, and Wilson, David M., Eds. *From Viking to Crusader: The Scandinavians and Europe 800-1200*. New York: Rizzoli International Publications, Inc., 1992. ISBN 0-8478-1625-7.

expectation that an exhibition would open in late 1999 or early 2000, in less than four years.

In May 1996, NCM asked that the Danish Embassy to approach the Smithsonian on NCM's behalf. In the fall 1996, a representative from the Danish Embassy in Washington first approached NMNH with the exhibition idea. From the start, the *Vikings* idea arrived with only a promise of partial funding, and with a requirement to travel the exhibition nationally. Two other museums, the American Museum of Natural History (AMNH) in New York and the Canadian Museum of Civilization (CMC) in Ottawa were also contacted. AMNH declined to participate; CMC participated in early discussions with both NCM and NMNH.

At NMNH the first response to curating *Vikings* was mixed, since the museum had limited expertise in the subject and almost no collection to support an exhibition. The NMNH staff person who became the exhibition's lead curator, however, had been credited with finding, in 1967, a copper pendant from the mid-1200. This was the first-ever known Viking artifact at a Native American site in Canada. The museum's initial response to the Embassy was that NMNH "could not solely curate an original show because of time and personnel resources." At the same time, museum staff felt certain that an exhibition about *Vikings* could attract a large audience.

The most qualified individual to spearhead such an effort, who became the lead curator, was initially unenthusiastic about an exhibition limited to art and culture. After internal discussion and consultation with external subject matter experts, NMNH proposed a changing the focus to Viking voyages, discoveries, and settlements in the North Atlantic and New World. The exhibition would focus on the settlement of Iceland, Greenland and Vinland, supported by archeological evidence and saga accounts and 'spiced' by controversies that continue to surround claims of North American Viking finds.

From the start, NMNH recognized that executing and traveling *Vikings* would involve extensive human and financial commitments well beyond its own resources. A plan was developed to have NMNH co-curate the exhibition with the Canadian Museum of Civilization (CMC). NCM wanted the exhibition to be launched in the United States. Major personnel changes at CMC, and the departure of its director for New Zealand, resulted in the rejection of this plan for collaboration with CMC.

After the exhibition idea gained ground at NMNH, during the first half of 1997, three senior staff visited Iceland, Norway, Finland, and Sweden where they met with different cultural leaders and groups that could potentially contribute to the development of this exhibition. The trip was financed by the NCM.

Approval Process

NMNH has a formal committee, the Public Programs Committee (PPC) that reviews and approves exhibition proposals. As early as September 1996, when the idea was first brought to NMNH, the PPC discussed the idea and expressed enthusiasm for it. As the idea developed, the PPC was kept informed. Once the idea became viable, and both the senior curator and the associate director of public programs were comfortable with an overall storyline and funding possibilities, *Vikings* was on a fast track.

In order to get NCM approval to proceed, NMNH prepared a proposal and submitted it to NCM in September 1997. The proposal became the agreement of understanding between the various organizations and countries. The proposal stressed the need for a funding plan. The target opening date was set between late 1999 and mid-2000. This schedule was seen as ambitious, given the number of objects that needed to be assembled from overseas collections and the attendant fundraising.

Funding, Budget and Cost

From the start, NMNH made its plans for *Viking* with the assumption that partial funding was available from and through the NCM. Using the initial estimates of \$4.0-\$4.5 million for an exhibition with many enhancements, NMNH and the NCM agreed that each would be responsible for about half the costs. NCM's portion would come from its own resources (\$1 million) and they would solicit another million from individual Nordic governments. The NMNH share would be totally dependent on finding sponsors. The museum assumed that NCM would enlist Scandinavian sponsors and that the subject matter and its American orientation would facilitate fundraising. NCM, however, thought that the museum should try to solicit American companies, as well. The funding arrangements were informal at this stage in the project and nothing was in writing.

At the January 1998 official project "kick off" meeting, held several months after the proposal was submitted to NCM, both NCM and NMNH staff stressed that fundraising should be coordinated between NCM and the museum to avoid overlapping solicitations. Several interviewees indicated that responsibility for fundraising was a point of contention throughout the project. NCM felt that the museum was not committing sufficient resources to the effort; the museum felt that it was not receiving support in making contacts with potential sponsors. In mid-February 1998, NCM committed \$1 million to *Vikings*. The funds were promised in two annual installments. The original

plan, as noted above, called for about \$2 million from Nordic sources, one million from NCM and another million from individual Nordic governments. NCM had provided, several months earlier, an initial \$40,000 planning grant. Funding from individual Nordic governments did not materialize, although they assisted in many other ways. For example, they applied “the necessary arm-twisting” when museums were reluctant or slow to lend artifacts.

NMNH revisited the plans and budget after receiving the lower commitment from NCM and after initial indications that fundraising would be difficult. In April 1998 both “high” and “low” budget estimates were drawn up for the exhibition. The high side remained as before, \$4.5 million; the low end was \$3.2 million. In dollar terms, to get to the low estimate, the design and production elements showed the largest decrease. However, the largest percentage decreases were in the education and marketing budget categories.

At NMNH, an organizational infrastructure was not in place to facilitate fundraising for *Vikings*. The senior fundraiser had left the museum, a replacement had not been found, and several other projects were in the queue. Fundraising became the responsibility of the associate director for public programs; in early 1998 he started working with an individual with fundraising experience; she increasingly assumed fundraising responsibility.

In June 1998, NMNH alerted the Nordic Council of Ministers that if both NCM and sponsorship funds were not in hand by mid-September, the museum would drop out, or the show would be greatly scaled back. NMNH could not make a financial commitment to the project, as it had no fallback source for funds. Federal funds available for exhibitions at NMNH are minimal, no more than \$120,000 per year. NCM responded that they were discussing the issue and hinted that they had an offer from another museum to curate the show. At this point, NMNH set the deadline at October 1, 1998 for having funding commitments in hand or else they would drop out.

The museum extended the October 1, 1998 fundraising deadline due to promises from the Nordic Council that they could help meet the funding goals. Fortuitously, negotiations were underway with Volvo. Volvo initially pledged \$2 million dollars, but they actually came through with \$1 million in June 1999. Volvo also promised to raise \$500,000, but did not accomplish that goal. In addition, the amount of advertising that Volvo did “never reached the level” the museum expected. In explaining Volvo’s activities, interviewees indicated that Volvo corporate restructuring at the time affected their ability to advertise and raise funds. When, in November 1998, Volvo made its funding commitment of \$1 million, the exhibition was given a “green light” to proceed with implementation – eighteen months before the scheduled opening in spring 2000.

Over the next year, fundraising continued and the staff proceeded with the assumption that they were working at the low budget estimates. Ultimately, NMNH had to scale back the exhibition further and use some of NMNH's federal appropriations to defray costs [about \$45,000]. In September 1999, the final base budget for *Vikings* was established at \$2.5 million, with most of the funds in hand (\$2.1 million).

To summarize, *Vikings* was initially was estimated at a maximum of \$4.5 million; when funding difficulties became apparent, a lower estimate of \$3.2 million was prepared (April 1998). The final base budget was \$2.5 million (September 1999). The Nordic Council of Ministers and the Volvo Corporation each provided one million dollars to support the development, design and production of *Vikings*. Additional sponsors, Phillips Petroleum Norway, Barbro Osher Foundation, Husqvarna Sewing Machines, and the Sons of Norway made smaller donations. In addition to internal staff salaries, NMNH used about \$45,000 of its own federal appropriations.

Not unexpectedly, the museum store generated funds for the museum. After all the expenses of operating the store were accounted for, NMNH earned a profit of \$81,000.

Organizational Structure and Responsibility

As a multi-national collective effort, *Vikings* was a complex organizational undertaking. Several interviewees outside the museum felt that organization and coordination could have been handled better. Other interviewees were amazed at how well and how quickly, the parts ultimately came together and how well the NMNH team worked.

In October 1997, within a month of the proposal being submitted to NCM, NMNH, Parks Canada, and the Canadian Museum of Civilization (CMC) met to develop an implementation plan. They tentatively agreed that NMNH would act as the project's organizer, Parks Canada would contribute artifacts and its expertise from L'Anse aux Meadows (the earliest known European settlement in the New World), and that CMC would contribute artifacts and produce an IMAX film. As a result of staff changes and fundraising difficulties, CMC's participation - in the end - was minimal and plans for the IMAX film did not materialize. The NCM initially was asked to coordinate Nordic involvement (artifacts, scholars, and sponsors) and facilitate meetings, but because of the technical nature of loans and the need for curatorial interactions with the scholars, NMNH handled both tasks. The NCM was involved in identifying sponsors and facilitating meetings in Washington and in Scandinavia.

Administration of this exhibition was assigned to the chief of special exhibits at NMNH who works directly for the associate director for public programs. The chief had the responsibility of developing and tracking budgets, developing and tracking schedules, developing requests-for-proposals and judging proposals for design and production, ensuring that contracts moved through the bureaucracy, and reviewing the curatorial input (e.g., scripts, text labels, etc.). He also had budgetary authority and had to approve all expenditures. He worked with two staff members assigned to the project.

On an intermittent basis, the director of education undertook specific responsibilities, such as reviewing the didactic materials, developing a handout, and planning educational and public programs. The director of education was responsible for the development of the associated website.

A senior NMNH curator and an NMNH curatorial assistant led the 13-member curatorial team. The two NMNH staff were responsible for organizing the content of the exhibition sections, identifying objects to support the main themes, writing the script and parts of the catalogue, and coordinating input from the other members. The eleven other curators, scholars from eleven different institutions in Scandinavia, Canada, and the United Kingdom, and the United States, focused primarily on the catalogue, and assisted with script development and review. These scholars were also involved in identifying objects from collections in their individual countries. After the objects were identified, obtaining loans agreements and arranging for objects to arrive at NMNH involved dealing with 30 different institutions or private collections.

The responsibility for representing NCM to NMNH, as well as coordinating with the five Scandinavian countries and making decisions on their behalf, was assigned to an individual at the Danish Embassy in Washington. Since she had other Embassy duties, the local NCM representatives decided to hire someone specifically to help NMNH staff and act as the liaison between with the Embassy group. He was assigned the task of coordinating the tour of the exhibition, organizing and chairing monthly *Vikings* staff task force meetings, focusing on public relations, and handling other administrative duties.

As a forum for information sharing and some decision-making about public programs and public relations, representatives from the various organizations involved met on a monthly basis. This group's membership included representation from the exhibits department, the NMNH curators, and a representative from the office of the assistant director for public programs. It also included the NCM liaison and members of the NCM member communities.

At least one person from The White House Millennium Council attended the meetings. The White House Millennium Council was created by the Clintons “to encourage all Americans to participate in meaningful activities to mark the new millennium.” NMNH contacted the White House and the exhibition became one of the Council’s “International Millennium Events.” The Council listed *Vikings* as a partnership between the Smithsonian and the White House. At various times, the Council helped manage relations with the NCM through the State Department. The individual countries in the NCM looked to NMNH to be the “appeaser” when they had disagreements. The museum was not prepared to act in this diplomatic position. The State Department was very effective in dispelling tensions. The group met on a monthly basis for about a year before the opening, June 1999 – June 2000. Interviewees felt that, although time consuming, the task force facilitated communication and played a critical role in the success of the exhibition’s opening events.

Interviewees both inside and outside NMNH indicated that the structure of the museum, especially definitions of authority, presented some problems. While there was basic agreement that procedures would follow NMNH’s standard exhibition-making process, authority for decision-making was sometimes a murky area. For example, who had the responsibility to make the decision about objects in the exhibition when the designer and curator had different opinions? Was it the project manager? Did curatorial decisions rule? In retrospect, senior staff agrees that the points of contention were minimal considering the scale of the project. They emphasize that they learned to balance individual agendas and perspectives with the need to produce a successful exhibition.

Concept and Design Development

Two months after the proposal was submitted, December 1997, curatorial planning meetings were held at the NCM offices in Copenhagen. NMNH, Nordic Ministers, and Canadian representatives attended. The report that came out of those meetings contained the basic outline of the exhibition: Introduction, Westward expansion, Viking impact, a Viking ship replica, L’Anse aux Meadows settlement reconstruction, and archeological materials. The scope of the exhibition was further refined in January 1998, when reactions were solicited from a broader set of people, especially staff and scholars at Scandinavian museums. Scandinavian representatives felt that the opening part of the exhibit, dealing with Viking homelands, should be expanded to equal one-third of the exhibit. This would allow the “impressive and beautiful specimens from the homeland regions to be displayed.” Implementing these suggestions added artifacts to the exhibition, since each of the countries felt strongly about some objects.

At no point in the concept or design development was any effort made to solicit input from potential visitors. The director of education was assumed to be the stand-in for the public. No background work was undertaken, none of the exhibition's techniques were tried out with visitors, and no prototype testing was conducted. Several interviewees felt that the exhibition's approach towards dispelling myths about Vikings would have especially profited from conversation with visitors and prototyping.

Until early 1999, the NMNH curatorial staff and exhibits office continued to refine and develop the exhibition, while the non-NMNH scholars continued research for the exhibition and catalogue. Fundraising was having problems and the exhibits office could not procure contractors needed to complete design and begin implementation because they did not know how much money they would have for the exhibition.

The Office of Exhibits Central, working with the NMNH curators and the exhibits office, developed the initial floor plan for *Vikings*. It became the basis for the design request-for-proposal. Although NMNH had identified a specific design firm it wanted to employ, SI contracting rules made it difficult to contract with the firm under the schedule constraints. The museum first contacted SI's contracting office in December 1998, after the funds from Volvo were assured, and requested a design firm for mid-January (1999). The design requirements and tight schedule (four months to opening) meant that a contract had to be negotiated with a firm that had an SI Open Term Contract (OTC). The total design contract fee of \$270,000 included a writer, an illustrator and independent local photo researcher.

In commenting on the final product, several interviewees noted that the exhibition suffered from too much text material and a very cramped space. In part, the cramping resulted from the firm curatorial requirements for the number of objects to be included in the exhibition. A request on the part of the team for more space was turned down by NMNH. In addition to the design contract, NMNH contracted with a fabricator, a bracket maker, a muralist, and an audio-visual consultant. These contracts were awarded early in 2000 after all the design work was completed and just months before a planned opening.

Early in 1999, NMNH negotiated with Ward Cronkite TV on the production of an introductory film for *Vikings*. This company was in the planning stages of a one-hour documentary *Lief Eriksson: The Man who (Almost) Changed History*. The film project had themes similar to those of the exhibition. Ward TV produced the 10-minute introductory film, at a cost of \$50,000, in exchange for curatorial assistance with the *Lief Eriksson* film. If NMNH had had to produce the film independently, the cost would have exceeded \$200,000.

Fabrication and Installation

Arranging loans of Viking artifacts was an arduous process. Because other Viking exhibits were taking place in Europe at the same time, there was competition for specific objects. Several museums would not loan objects to NMNH, because of previously encountered problems with an SI traveling exhibition. Another problematic aspect of the loan process was the use of couriers. Many European museums insist that couriers travel with the objects on loan. Originally 30 couriers were identified for *Vikings*, coming from 30 lenders. The *Vikings*' team negotiated extensively with overseas museums to bring this number down to seven. These couriers delivered objects to NMNH, participated minimally in the installation, and also returned for the de-installation. They repeated these trips for every tour venue. The countries would not consider and dismissed NMNH's suggestion for one designated, rotating courier representing the whole group, assisted by one or two other couriers, at each site. Having three couriers rather than seven would have simplified coordination and greatly reduced travel and accommodation costs. This arrangement would have been workable since NMNH hired its own experienced art handlers for installation and deinstallation at each venue.

A contractor undertook space preparation at NMNH. The space became available on January 2, 2000, after *Ainu* had closed. Fabrication had to move quickly; the contract was let on February 1, 2000 and installation began at the end of March. Fortunately, the museum had secure space for holding artifacts until the actual installation and could stage artifact placement with the various couriers. [The fourth floor of the Discovery Center, the current immersion theatre, had just been constructed but was still empty.]

Marketing and Promotion

Promotional activities were the responsibility of the Office of Public Affairs at NMNH and the NCM liaison. Public Affairs first became involved with *Vikings* in January 1998, when they coordinated the first press event as part of the "kick off" meeting. It was primarily oriented to the Nordic press with the intent of getting people of the Nordic regions aware of and excited about the exhibition. The next major event was in April 1999, with the White House Millennium Council and First Lady Hillary Clinton. This event was designed to gain attention in the United States and "signal to the Nordic people that the exhibition would have considerable prestige."

Although *Vikings* was the signature event for the NCM, there was little actual promotional support from them or advertising. Similarly, as noted earlier, the amount of

advertising provided by the main corporate sponsor, Volvo, fell short of expectations. The Nordic countries, however, had individual press representatives that worked with NMNH's public relations office. The press representatives were part of the local embassies' press offices. In retrospect, it is difficult to assess the impact of low promotional activity or advertising. It is not clear how much, if at all, it affected the exhibition's draw.

The total promotional budget of *Vikings* was \$50,000. Budgets for comparable exhibitions at fee-charging museums would be at least five times as high. To compensate for NMNH staff shortfalls, \$40,000 of this budget went to a public relations firm (March 2000) to disseminate what NMNH had developed to that date and to help with the opening. NMNH staff commented that contracting with the firm nine months earlier would have helped, but funds were not available. Yet, even with its minimal promotional budget, *Vikings* drew a large attendance.

The press conference, headlined by Hillary Clinton, drew worldwide media attention. As Attachment A shows, over 100 placements in newspapers, magazines and periodicals appeared, including several stories in the *New York Times* and the *Washington Post*. The exhibition was featured on the covers of both *Newsweek* (April 3, 2000) and *Time Magazine* (May 22, 2000), featured on ABC's *World News Tonight* and covered by the CBS *Saturday Early Show*.

Activities Related to the Exhibition

Programming related to the exhibition was viewed as important by the NCM representatives, as well as by the museum's Department of Education. High on the agenda of the monthly task force meetings was a discussion of program ideas and events surrounding the opening. In addition to docent-led tours, school tours and group tours, a "hands-on" cart was assembled for visitors with replicas of tools, artifacts, and instruments to hold and touch. On several weekends, Viking re-enactors demonstrated various aspects of Viking life such as weaving, metalworking, carving and cooking. Opening weekend, a scholarly symposium with international participation discussed many of the exhibition's themes. The programs are described in Attachment B.

The educational programming was more modest than NMNH had originally envisioned. As a result of funding difficulties, the education budget was cut severely. In the end, only \$15,000 was available for on-site activities. According to several staff members, the major limitation from an education department's perspective was the exhibition's timing. Because it was on view from the end of April to mid-August, *Vikings* had no classroom tie-in and very

low school-group visitation. At the same time, budget shortfalls initially eliminated a family guide and school-related materials that could have been used at other sites. (An abbreviated map/family guide was produced for use at NMNH). According to staff “school curriculum had always been important for this project and we did follow up with suggested school curriculum tie-ins. In addition a Family Guide was produced and used at other sites.” The education department also oversaw the development of the exhibition website.

From the start, an exhibition catalogue was planned. The catalogue, published by the Smithsonian Press, appeared in tandem with the exhibition’s opening. In addition to the NMNH curators, over twenty other international Viking scholars contributed. The final catalogue, with the same name as the exhibition, is 432 pages and has over 700 color images. Over 60,000 cloth and soft cover copies have been sold; a high number for an exhibition catalogue. It became the Society for American Archaeology’s Book of the Year Selection. While some interviewees felt that work on the catalogue distracted from the exhibition planning, others cited its commercial success as evidence that a scholarly catalogue should accompany all exhibitions.

Travel Schedule

As with all traveling exhibitions, venues are generally selected by the initiating museum. In those cases where major sponsors are involved, the sponsors frequently influence the tour. The final tour order for *Vikings* is New York, Denver, Los Angeles, Houston, and Ottawa and Minneapolis. In most cases, the exhibition venues are natural history museums. The exceptions are the Canadian Museum of Civilization and the Science Museum of Minnesota. The Nordic Council of Ministers requested the former; considerable encouragement by local Scandinavian groups led NMNH to add the latter.

NMNH remains involved in the exhibition, as the museum is responsible for the tour. There is a full-time staff member responsible for de-installation, travel and installation. The requirement to travel the exhibition had some implications for design and fabrication and, as noted earlier, for the coordination efforts and costs of artifact couriers.

Before the exhibition opened on the Mall, NMNH began to solicit venues for the traveling exhibition. It set the fee for receiving institutions at \$150,000 plus shipping. NMNH hoped that the traveling version of *Vikings* would pay for itself. Until recently, it seemed that NMNH would incur a small loss, in part because courier and other costs were underestimated. However, it is now clear that that NMNH will break-even on the tour, because dispersal costs are not as great as originally thought.

Assessment

From the perspective of visitation levels and media coverage, the exhibition can be judged successful. However, it has not received critical professional review or extensive evaluation of visitors' experiences. At the American Museum of Natural History, its first travel venue, a brief survey was conducted. That survey indicated very high public satisfaction and a general understanding of the exhibition's themes.

The *Vikings* exhibition process at NMNH took a total of 3 years from the start of proposal development or 4 years from the time the idea was first presented to NMNH.

ATTACHMENT A.

TIMELINE SUMMARY BY KEY STAGES: *VIKINGS*

BACKGROUND TO IDEA

- The Nordic Council of Ministers had been discussing the idea of an exhibit on Vikings in America and had been looking for a partner (May 1996)
- A representative of the Danish Embassy met with NMNH's associate director of public programs to present the idea (September 1996)

CONCEPT AND DESIGN DEVELOPMENT (10 MONTHS)

- NMNH team travels to Scandinavia to explore the concept (March 1997)
- Proposal development begins at NMNH (Summer 1997)
- Proposal presented to NCM (September 1997)
- NCM provided a \$40,000 planning grant to support the curatorial meetings
- Workshop in Copenhagen (December 1997)

FUNDRAISING, DESIGN DEVELOPMENT, FABRICATION AND INSTALLATION (28 MONTHS)

- NCM commits \$1 million in two installments over next two years (February 18, 1998)
- Deadline to solicit funds set as October 1, 1998
- Deadlines reached and extended several times
- NMNH receives commitment from Volvo for \$1 million and *Vikings* gets the go-ahead (November 1998)
- Nordic Ministries pledges 6,700,000 DKK (\$776,282 in current US dollars), in two installments (February 15, 1999)
- Designer was hired (March 1999)

- “Final” base budget established at \$2.5 million (September 1999)
- Budget update: Have \$2.1 million in-hand, short \$400,000 (October 1999)
- Design was completed (November 1999)
- Contracts let for a bracket maker (December 1999), an audio-visual consultant (January 2000), and a fabricator (February 2000)
- Budget update: \$2,504,850 budget. No note of deficit
- Graphics were completed (January 2000)
- Fabrication was completed (April 15, 2000)
- Installation was completed (April 19, 2000)
- *Exhibition opens* (April 29, 2000)
- NMNH funds used to help pay for *Vikings* (August 2000)
- *Exhibition closes* at NMNH (September 5, 2000)

EXHIBIT VENUES

1. Washington, DC; April 29-August 13, 2000; National Museum of Natural History
2. New York City; October 21, 2000-January 20, 2001; American Museum of Natural History
3. Denver; March 2, 2001 - May 31, 2001; Denver Museum of Nature and Science
4. Houston; July 13-October 14, 2001; Houston Museum of Natural Science
5. Los Angeles; November 23, 2001-March 16, 2002; Los Angeles County Museum
6. Ottawa/Hull; May 16-October 14, 2002; Canadian Museum of Civilization
7. Minneapolis, MN; November 2002 – May 2003; Science Museum of Minnesota

ATTACHMENT B.

EXHIBITION RELATED ACTIVITIES: *VIKINGS*

PUBLIC PROGRAMS AT NMNH (2000)

Walk-in tours. May 3 - August 13

School tours. Tuesdays – Fridays, May 2 – June 16. Groups of 30 students, 3rd grade and up.

Vikings: The North Atlantic Saga Symposium

Friday, April 28th and Saturday, April 29th, Baird Auditorium, 9:00 a.m. – 4:00 p.m.

Sessions:

Vikings in Europe. Daily Life in the Viking Homelands

Vikings in North America. Viking Expansion and Cultural Blending in the British Isles. Environmental Impact of the Viking Settlement of Iceland.

Vikings in North America. The Viking Settlement at L'Anse aux Meadows, Canada. 500 Years of Norse Contact with North America

Native/Norse Contact. Ellesmere Island: Vikings in the Far North. Scattered Signs of Native/Norse Contact. The Mi'kmaw View of the Vikings

The Greenland Colonies. Daily Life in Norse Greenland. Greenland's Ties to Europe: Trade, Religion, and Fashion. The Demise of the Greenland Norse

Saturday, April 29, Baird Auditorium

Lecture: *Viking Ships*

Lecture: *Vinland Sagas*

Lecture: *Controversial "Viking" Finds in North America*

Dance: *Uaaajeernej*, dance tradition popular in East Greenland 70 years ago.

Puppet Play: *Leifur the Lucky One*

Sunday, April 30, Baird Auditorium

Dance: *Uzzjeernej*

Puppet Play: *Leifur the Lucky One*

Snaeland School Children's Choir

Saturday, April 29 and Sunday, April 30

Viking Living History. Authentic recreations of Viking daily life presented by The Longship Company with two reproductions of Viking ships.

Saturday, May 6th and Sunday, May 7

Viking Living History - Viking Arms and Armor; The Longship Company

Thursday, May 11

Thor Heyerdahl: A Special Evening with the World-Renowned Explorer

Friday, May 12

Lecture: *Vikings in Popular Culture*

Saturday, May 13 and Sunday, May 14

Viking Living History

Saturday, May 20 and Sunday, May 21

Display of full-scale replica of Viking boat

Viking Living History – Viking food

Friday, May 26

Lecture: *Viking Age Iceland: Sagas, History, and Archaeology*

Saturday, May 27 and Sunday, May 28

Viking Living History – Fiber Arts

Saturday, June 3 and Sunday, June 4

Viking Living History – Tablet Weaving

June 9

Lecture: *First Contact: Natives and Norsemen in the New World*

Saturday, June 10 and Sunday, June 11, 2002

Lecture: *Viking Living History – Viking Arms and Armor*

Friday, June 16

Lecture: *The Vinland Map: Genuine or Fake?*

Saturday, June 17 and Sunday, June 18

Viking Living History Exhibit

Sunday, June 18

Lecture: *Leif Eriksson, the Man Who Almost Changed the World*

Tuesday, June 20 – Friday, June 30

Discovery Theater: Leif Eriksson, Viking Voyager

Thursday, June 22

Vikings: *The North Atlantic Saga*. A six-week course complementing the exhibit celebrating the 1000th anniversary of the Vikings of North America

Friday, June 23

Lecture: *A Viking Voyage*

Saturday, June 24 and Sunday, June 25

Viking Living History Exhibit

Friday, June 30

Lecture: *In Search of the Viking*

Seven Living Historians from the Viking Ship Museum, Roskilde, Denmark

Saturday, July 1 and Sunday, July 2

Seven Living Historians from the Viking Ship Museum, Roskilde, Denmark

Friday, July 7

Lecture: *Bibrau's Saga*

Saturday, July 8 and Sunday, July 9

Viking Living History – Viking Arms and Armor

Friday, July 14

Lecture: *Sagas of the Vikings*

Saturday, July 15 and Sunday, July 16

Film: *The Vikings*

Friday, July 21

Lecture: *Viking Ships*

Saturday, July 22 and Sunday, July 23

Viking Living History – Nalbinding

Saturday, July 29 and Sunday July 30

Viking Living History – Wood Working

Friday, August 4

Film: *The Vikings*

Saturday, August 5 and Sunday, August 6

Viking Living History – Leather Working

Saturday, August 12 and Sunday, August 13

Viking Living History – Fiber Arts

WEBSITE AND PUBLICATIONS

<http://www.mnh.si.edu/vikings/>

Vikings: The North Atlantic Saga, a catalogue edited by William Fitzhugh and Elizabeth I. Ward, Smithsonian Institution Press

SELECTED NEWS ARTICLES AND REVIEWS

Associated Press, "Smithsonian Features Viking Exhibit." Thursday, April 27, 2000.

Reuters, "Prince Joachim of Denmark Attends the Opening of the Smithsonian's Vikings Exhibition," photo to accompany AP story.

New York Times, "Royal Praise for Exhibition that Recasts the Vikings," Friday, April 28, 2000, p. A18

Washington Post, "Smorgasbord of Royalty Spread for Viking Exhibit," Friday, April 28, 2000, p. C1

abcNews.com "A Viking Chapter in American History," on-line beginning Friday, April 28, 2000.

Reuters, "Clinton Celebrates Vikings with Nordic Lunch," Friday, April 28, 2000

Associated Press Online, "Clinton Opens Viking Exhibit," on-line beginning Friday, April 28, 2000

United Press International, "Clintons Host Nordic Dignitaries," Friday, April 28, 2000

Pantagraph, (Bloomington, IL), "Vikings land again in North America – New Smithsonian exhibit highlights impact of." Friday, April 28, 2000

Tulsa World (Tulsa, OK) "Exhibition features history of Vikings," Friday, April 28, 2000

Times Union (Albany, NY) "Viking exhibit pierces fierce image," Friday, April 28, 2000

Providence Journal (Providence, RI) "Vikings land at Smithsonian: exhibit tell exploration saga." April 28, 2000

Colorado Springs Gazette, (Colorado Springs, CO), "Exhibit honors Viking heritage," Friday, April 28, 2000

Independent Record (Helena, MT), "Viking ships return to North America," Friday, April 28, 2000

Tri-Valley Herald, (Pleasanton, CA), "Return of the Vikings to American Shores," Friday, April 28, 2000

Times Herald Record, (Middletown, NY), "Vikings return to American to tell seafaring saga," Friday, April 28, 2000

Atlantic City Press, (Atlantic City, NJ), "1000 years later, Vikings return to North America," Friday, April 28, 2000

Florida Times-Union, (Jacksonville, FL), “Vikings return to North America: \$3 million exhibit of Norse artifacts to tour continent,” Friday, April 28, 2000

Advertiser, (Montgomery, AL), “1000 years later, Vikings sailing back to U.S.,” Friday, April 28, 2000

Washington Post, “Raider’s Roost: Smithsonian Updates the Saga of Viking Explorers,” Saturday, April 29, 2000, pp. C1, C4

Washington Times, “Voyaging into the age of the VIKINGS,” Saturday, April 29, 2000

Denver Post, (Denver, CO), “New exhibit lauds saga of Vikings,” Saturday, April 29, 2000

Morning Star – Telegram (Fort Worth, TX), “Exhibition on Vikings opens at Smithsonian,” Saturday, April 29, 2000

Los Angeles Times (Los Angeles, CA), “Exhibit Honors Vikings’ Passage to New World,” Saturday, April 29, 2000

Toledo Blade (Toledo, OH), “Viking exhibit sets sail in D.C.,” Saturday, April 29, 2000

Westchester Journal News, (White Plains, NY) “Exhibit aims to show Vikings spread more than just misery,” Saturday, April 29, 2000

News & Eagle, (Enid, OK), “Replica of Viking ship may end up in Smithsonian,” Saturday, April 29, 2000

Georgia Times-Union, (Jacksonville, FL), “Vikings return to North America: \$3 million exhibit of Norse artifacts to tour continent,” Saturday, April 29, 2000

El Paso Times, (El Paso, TX), “Iceland, New World celebrate 1000th year since Leif Ericson,” Saturday, April 29, 2000

Rockland Journal News, (Nyack, NY), “Exhibit aims to show Vikings spread more than just misery through history,” Saturday, April 29, 2000

Martinsburg Journal, (Martinsburg, WV), “Clinton hosts Nordic leaders at new exhibit,” Saturday, April 29, 2000

Killeen Herald, (Killeen, TX), “Viking show opens in Washington,” Saturday, April 29, 2000

Kansas City Star, (Kansas City, MO), “A salute to a heroic past: Clinton welcomes proud descendants of Viking explorers,” Saturday, April 29, 2000

Boulder Camera, (Boulder, CO), “Scandinavian Leaders OK Viking Exhibit,” Saturday, April 29, 2000

Press-Enterprise, (Riverside, CA), ‘Clinton Hails opening of exhibit on Vikings: The president welcomes five Nordic leaders for 1000th anniversary events,” Saturday, April 29, 2000

Intelligencer, (Wheeling, WV), “Clinton hosts Nordic Leaders,” Saturday, April 29, 2000

St. Marys Leader (St.Marys, OH), “Clinton hosts Nordic leaders to open exhibit,” Saturday, April 29, 2000

Annapolis Capital, (Annapolis, MD), “President Clinton hosts Nordic leaders,” Saturday, April 29, 2000

Wapakoneta News, (Wapakoneta, OH), “Clinton hosts Nordic leaders at Viking exhibit,” Saturday, April 29, 2000

Commercial, (Leesburg, FL), “Clinton hosts Nordic leaders,” Saturday, April 29, 2000

Breeze, (Cape Coral, FL), “Clinton hosts Nordic leaders,” Saturday, April 29, 2000

Woodland Hills Daily News, (Los Angeles, CA), “Clinton hails Vikings at new exhibit in museum,” Saturday, April 29, 2000

East Valley Tribune, (Mesa, AZ), “President hosts Norse leaders for new exhibit,” Saturday, April 29, 2000

Freeman, (Waukesha, WI), “Clinton hosts leaders at Viking exhibit opening,” Saturday, April 29, 2000

Herald, (Wausau-Merrill, WI), “Clinton hosts Norse leaders for new exhibit,” Saturday, April 29, 2000

Carroll County Times, (Westminster, MD), “The Vikings: More than Hagar and horns,” Saturday, April 29, 2000

Monroe News, (Monroe, MI), “Nordic leaders arrive for Viking exhibit,” Saturday, April 29, 2000

Enterprise, (High Point, NC), “Clinton hosts Nordic leaders for opening of Viking exhibit,” Saturday, April 29, 2000

Post-Crescent, (Appleton, WI), “The Vikings land again,” Saturday, April 29, 2000

Press-Journal, (Vero Beach, FL), “Clinton lauds Viking exhibit at Smithsonian,” Saturday, April 29, 2000

News-Sun, (Springfield, OH), “Clinton, Nordic leaders open Viking exhibit,” Saturday, April 29, 2000

Muse (monthly magazine), “Vikings in America,” May/June 2000, pp. 30-37

Time (weekly magazine), “The Amazing Vikings: They earned their brutal reputation – but the Norse were also craftsmen, explorers and believers in democracy,” May 8, 2000 (vol. 155, no. 19 edition, published May 1, 2000) cover and pp. 68-78

TIME.com, “The Amazing Vikings,” on-line beginning Monday, May 1, 2000

Washington Post, “Voyages with Vikings: The Researcher’s Own Hundred-Year Sage,” Monday, May 1, 2000, p. C2

New York Times, “Ship to Shore,” Monday, May 1, 2000

International Herald Tribune (Paris, France), “People,” May 3, 2000

East Lyme Tymes, (Niantic, CT), “Niantic Could be Home of Viking Settlement,” Wednesday, May 3, 2000

Time for Kids, “Lord of the Seas: Taking a New View of the Ancient Vikings,” May 5, 2000, pp. 4-5

News-Sun, (Waukegan, IL), “Exhibit shows a different side of Vikings,” May 7, 2000

Gazette-Journal, (Reno, NV), “Vikings’ lands at the Smithsonian,” Sunday, May 7, 2000

East Valley Tribune, (Mesa, AZ), “Norsemen invade Washington: New Viking exhibit lands at Natural History Museum,” Sunday, May 7, 2000

Sun, (Bremerton, WA), "Viking exhibit lands at museum," Sunday, May 7, 2000

Beacon News, (Aurora, IL), "Exhibit shows a different side of Vikings," Sunday, May 7, 2000

Tribune, (Scottsdale, AZ), "Norsemen invade Washington," Sunday, May 7, 2000

Courier News, (Elgin, IL), "Exhibit shows a different side of Vikings," Sunday, May 7, 2000

Herald News, (Joliet, IL), "Exhibit shows a different side of Vikings," Sunday, May 7, 2000

Record, (Hackensack, NJ), "Celebrating the Vikings' New World Sojourn," Sunday, May 7, 2000

Den Danske Pioneer, (Hoffman Estates, IL), "Opening Festivities, Gala and Symposium for New Viking Exhibition Draw Scandinavian Royalty, Heads of State to Washington, D.C." Monday, May 8, 2000, pp. 1 & 11.

The Sun: Scandinavian-USA News, (Evergreen, CO), "Vikings: The North Atlantic Saga," May 11, 2000

Freelance-Star, (Fredericksburg, VA), "Smithsonian displays Viking marvels," Sunday, May 11, 2000

International Herald Tribune, (Paris, France), "The Vikings in a New World," May 11, 2000

Bulletin, (Bend, OR), "Ancient site offers clues to Vikings in America," Friday, May 12, 2000

Toronto Star, (Toronto, Canada), "Museum exhibits in U.S. capital are free," Saturday, May 13, 2000

Florida Today, (Melbourne, FL), "See free exhibits in Washington," Sunday, May 14, 2000

New Hampshire Sunday, (Manchester, NH), "Exhibits spice up D.C. experience," Sunday, May 14, 2000

Albuquerque Journal, (Albuquerque, NM), "Viking exhibit a capital attraction," Sunday, May 14, 2000

Tribune & Times, (Tampa, FL), "Natural History Museum welcomes Viking invasion," Sunday, May 14, 2000

Des Moines Register, (Des Moines, IA), "New exhibits spice up D.C. visits," Sunday, May 14, 2000

The Independent, (London, United Kingdom), "Amiable Vikings went on transatlantic shopping trips to Canada," May 15, 2000

Republican & Herald, (Pottsville, PA), "Things to do," Thursday, May 18, 2000

The Globe and Mail, (Toronto, Canada), "Vikings: Barbarians or Bad Rap," Saturday, May 20, 2000, p. A14

theglobeandmail.com, (Toronto, Canada), "Vikings: Barbarians or Bad Rap," Saturday, on-line beginning May 20, 2000

The Globe and Mail, (Toronto, Canada), “L’Anse aux Meadows: The desolate outpost doomed from the start,” Saturday, May 20, 2000, p. A15

theglobeandmail.com, (Toronto, Canada) “L’Anse aux Meadows: The desolate outpost doomed from the start,” on-line beginning Saturday, May 20, 2000

Richmond Times-Dispatch, (Richmond, VA), “Viking Anniversary,” May 21, 2000

Lexington Herald-Leader, (Lexington, KY), “Vikings, without the horns: Smithsonian exhibit debunks stereotypes surrounding the Norsemen,” Sunday May 21, 2000

Washington Post, (Washington, D.C.), “Revamped Natural History Rockets Ahead in Visitors,” May 25, 2000, pp. C1 & C5

Dawson News, (Dawson, GA), “Viking Memories,” Thursday, May 25, 2000

Reading Eagle, (Reading, PA), “Natural History exhibit No. 1 for tourists at Smithsonian,” Friday, May 26, 2000

FOCUS, (Germany), “Wikinger: Ost trifft West,” May 29, 2000, pp. 142-148

Where, (Washington, D.C.), “Top Picks at the Museums: Presidents at bat, Gray and Blue déjà vu and the Vikings are coming!” June 2000, p.14

Modesto Bee, (Modesto, CA), “Vikings’ land, knocking Air & Space off its perch,” Sunday, June 4, 2000

Milwaukee Journal Sentinel, (Milwaukee, WI), “Researchers explore Norse map’s authenticity,” Monday, June 5, 2000

Seattle Times, (Seattle, WA), “For genius in boat design, it’s Norse, of course,” Monday, June 5, 2000, pp. A1 & A8

Il Sole-24 Ore, (Verbena, Italy), “Le Terre verdi’ del bandito Erik il Rosso,” June 25, 2000, p. 39

Baltimore Sun, (Baltimore, MD), “Viking Voyage,” June 26, 2000

SunSpot, Maryland’s Online Community, (Online service), “Viking Voyage,” beginning June 26, 2000

Washington Post, (Washington, D.C.), “When Vikings Ruled the Waves: Meet the People Who Gave Us Leif Ericson and ‘Wednesday,’ “KidsPost, Tuesday, June 27, 2000, p. C13

washingtonpost.com (Online service) “When Vikings Ruled the Waves,” beginning June 27, 2000

Washington Post, (Washington, D.C.), “Vikings Land in D.C.,” Weekend Section, “Weekend’s Best – Best of the Rest,” June 30, 2000, p.4

Washingtonian Magazine, (Washington, D.C.), “The Ultimate Museum Guide,” July 2000, pp. 77 & 89.

Archaeology, (monthly magazine), “Three Cheers for the Vikings! A New exhibition portrays the famed Norsemen not as the scourge of Europe, but as instruments of benefit and change,” July/August 2000, pp. 64-6

Minerva Magazine: The International Review of Ancient Art & Archaeology

- “Vikings in America: Runestones, Relics and Revisionism,” July/August 2000, pp. 8-12
- “The Art of the Vikings Age,” pp. 46-49
- “Wealth and Power in the Viking Age,” pp. 46-49

Maclean's, (Toronto, Canada), “Its Viking-mania,” July 10, 2000, pp. 30-31

Washington Post, (Washington, D.C.), “The Civilized Side of Viking Life,” Weekend Section, July 14, 2000, p. 49

SELECTED LIST OF BROADCAST – RADIO AND TELEVISION – COVERAGE OF VIKINGS

WETA-TV (Washington, D.C. Public Broadcasting Service), *Around Town*, Thursday, May 4; Sunday, May 6, 2000

National Public Radio (Washington, D.C.), “Vikings,” *Weekend Edition*, Sunday, May 7, 2000

National Public Radio (Washington, D.C.), “Vikings,” *Talk of the Nation*, May 30, 2000

CBS – *The Saturday Early Show*, (New York), “Vikings,” June 10, 2000

ABC – *World News Tonight*, (New York), “Vikings,” June 16, 2000

CASE III.

Santos: Substance and Soul

Introduction

Among the exhibitions included in the case studies of Smithsonian exhibitions conducted by the Office of Policy and Analysis, *Santos: Substance and Soul* stands out in several ways. It was developed and implemented by an organization without an exhibition-making tradition and without exhibition spaces, the Smithsonian Center for Materials Research and Education (SCMRE). The project leader and curator is a conservator who worked collaboratively with individuals in other Smithsonian organizations to produce this bilingual traveling exhibition.

Exhibition Description

Santos, the focus of this exhibition, are devotional woodcarvings of saints and the Virgin Mary. The carving of saints probably goes back to the 1600s, when rural populations had few priests and churches but many home altars. The tradition of carving santos continues to this day in the United States, especially in New Mexico and Puerto Rico. *Santos: Substance and Soul (Santos)* was on view at the Arts and Industries (A&I) Building between September 17, 2000 and March 31, 2001 and then traveled to the National Hispanic Cultural Center in Albuquerque, New Mexico. Its final venue was the Museo de Arte de Puerto Rico in San Juan where it closed on June 9, 2002.⁷ A timeline is included in Attachment A.

Santos featured 40 artifacts from New Mexico and Puerto Rico, but also included some santos from Central and South America, and the Philippines. This conservation-based exhibition integrated materials science research with the study of the creation and use of santos by interpreting these cultural icons through chemical analysis, X-ray imaging, microscopy, and other techniques typical of conservation. Visitors to the exhibition could pick up brochures, either in English or Spanish. In addition to the exhibition texts, visitors could obtain more information from four computer stations.

⁷ As a gesture of good will and to save shipping costs for materials not likely to be used by SCMRE, all of the exhibition furnishings were left as a gift to the Museo de Arte de Puerto Rico in San Juan.

At all three venues, *Santos* was augmented by educational programs, demonstrations by santos makers from Puerto Rico and New Mexico, and presentations and lectures on the technical and scientific techniques used for characterization and preservation. A list of these exhibition-related activities is in Attachment B.

Exhibition Origin

Santos is the first exhibition developed by SCMRE with a Smithsonian venue. A SCMRE conservator who works with paint on wood proposed it as a continuation of her work and interest in these icons. Beginning in about 1997, SCMRE worked with The National Museum of American History (NMAH) on a collection of Latino materials, the Vidal Collection. The Latino Pool, Congressional funds allocated to Latino initiatives and distributed competitively, gave NMAH \$150,000 to bring the Vidal Collection to SI. The former acting director of the Smithsonian Center for Latino Initiatives (SCLI), an individual with a life-long interest and training in Latino folk art, introduced a NMAH curator to the SCMRE conservator and suggested collaboration. The Latino Pool subsequently funded the researchers to conduct wood conservation workshops both at SI and in Puerto Rico.

Some of the Latino materials, including a wall of 75 santos, were included in an NMAH exhibition, *A Collector's Vision of Puerto Rico*.⁸ In Spring 1998, SCMRE sent a very small exhibition [*A Closer Look at Santos*], consisting of a couple of santos and slides about conservation to the de Saisset Museum, Santa Clara University, California. In the course of the four months on view, according to interviewees, it elicited “a great deal of interest” at this Catholic school. The conservator’s enthusiasm, combined with an SI interest in exhibitions showcasing specific cultures, led to the development of the more elaborate traveling exhibition that premiered at the Arts & Industries Building.

Approval Process

Since SCMRE has no exhibition-making capability, it needed to find both a venue and exhibition-making expertise. Both were available through the A&I Exhibits Office. The A&I office has exhibition proposal and implementation guidelines for exhibitors to follow. SCMRE approached the A&I office after an exhibition proposal had been internally vetted by its staff and approved by the SCMRE director.

⁸ Although *A Collector's Vision of Puerto Rico* and *Santos* overlapped slightly, there was no cross-referencing of exhibitions either at NMAH or at the A&I Building.

Exhibition-making fits into SCMRE's mission, according to a senior staff member, because of the Center's commitment to the dissemination and presentation of conservation-related information. SCMRE tries to reach audiences in the most efficient way and the staff is increasingly viewing exhibitions as a communication vehicle. Exhibitions, when presented in conjunction with workshops, lectures and educational programs can be, according to SCMRE senior staff, extremely effective outreach. In its work, SCMRE has also involved the western Spanish-speaking world, because they view it as open to new ideas about cultural preservation. *Santos* is part of this outreach strategy.

The A&I Exhibits Review Committee sends proposals to two subject matter experts before the committee meets. After experts comment on the content, the committee examines the proposal and focuses on the design plan, content, audience appeal, funding plans, and "newness". The review committee recommended tentative approval for *Santos* to the then Undersecretary for Science. After *Santos* received initial approval, SCMRE was asked for detailed budget and funding plans, a draft design of the exhibition and a script. Final approval was withheld pending assurance of funding. However, the A&I Exhibits Office scheduled space in A&I for the exhibition.

Funding, Budget and Cost

When *Santos* was initially proposed, SCMRE hoped that funds could be raised readily for it. Based on a preliminary exhibition proposal to the Latino pool, SCMRE received a \$10,000 planning grant and, subsequently, \$95,000 from the Latino pool to mount what became the A&I exhibition. From the start, SCMRE made the decision to supplement exhibition funds from its internal resources if fundraising was not successful. The decision on the part of SCMRE to provide funding was based on its assessment of the importance of the project, especially in view of its planned travel to Latino audiences. Subsequently, another \$25,000 was given from the pool.

Project members were dedicated to keeping costs low without compromising the design. The design contract was for \$34,000; a colleague at the Smithsonian American Art Museum did lighting on a pro-bono basis. The Office of Physical Plant (OPP) installed walls and everyone involved pitched in to install the exhibition at the A&I Building.

SCMRE had little success in generating outside funds. SCMRE does not have a development officer and staff interviews indicate that they had little support from "central" resources. The Center hired a consultant to help raise funds, but no funds were raised.

There are differences between the initial estimated budget that accompanied the proposal, the revised estimates that SCMRE produced during the early stages of development and the actual expenditures. The differences between the initial estimate and the revised estimate are in the higher cost of the design contract, more realistic estimates for production and construction in the A&I space, and the need to hire a registrar on contract. In the original proposal, SCMRE had assumed that it would have the services of an SI registrar.

A comparison of the revised estimate and the actual expenditures shows adherence to the budget. The estimated costs of the A&I exhibit, without staff time, promotion and outreach materials, were \$177,750; the actual cost was \$200,500.⁹ The major increases over the revised estimate are in higher costs for construction and contract staff (e.g., registrar, translator). Several interviewees suggested that the decision to travel the exhibition raised costs somewhat because the need to use more durable materials.

Concept and Design Development

As part of the initial planning, SCMRE contracted with a designer, formerly at American Art, to undertake the design work. A senior educator at SCMRE was added to the ‘team’ to handle some of the planning and review the materials being produced. The challenge for the team, after the initial approval, was to come up with ideas for the *Santos* exhibit that would be “crowd pleasers.” Their solution was to use light boxes to display X-rays of different santos.

The contract designer developed a preliminary layout and graphics for the exhibition proposal. There was little modification of the design after the concept drawing. A reading or study area had been planned, but was eliminated. The anticipated use of the study area did not seem to justify the cost. The total size fell a little, and the exhibition became more symmetrical (with the loss of the study area). The installed exhibition occupied approximately 3,500 sq. ft., about half of the space in the West Hall of the A&I Building. The colors for the space were selected to fit with the A&I building and originate from a photo of a famous mission in California. There was some compromise, as the group that produced the text panels was unable to easily match the original color choice. Rather than spend additional funds, they found an alternative. While there was a commitment to cost saving, the designer insisted on silk-screening labels, rather than using a less expensive process, since silk-screened labels would be more durable for travel.

⁹ These costs are on the high side, as some costs cannot be disaggregated between the A&I exhibition and outreach material (e.g., the web catalogue and brochures). For example, the contracted exhibition editor, translator, and web developer worked on both.

In addition to the design contract, SCMRE paid for the development of the web site and the touch screens used prominently in the exhibition (\$37,000). Several interviewees felt that this was a good use of funds, as the screens are a key educational element in the exhibition. There is no exhibition catalog; the website includes the same information as the exhibition touch screen computers.

Although SI has an extensive santos collection, the exhibition involved loans from New Mexico and Puerto Rico. According to the project director, the team felt it was important to be representative and the NMAH collection is geographically limited. Further, as part of outreach, borrowing from other places was considered a ‘good thing’ to do. A comment was made that the loan process from NMAH was longer and more arduous than loans from outside the Smithsonian.

Fabrication and Installation

The Craft Division of OPP built the exhibition wall structures and the Office of Exhibits Central (OEC) built the exhibit cases and acrylic vitrines. Most of the interviewees commented on the nature of these climate-controlled cases. Santos have very specific climate requirements, and not all the santos need the same conditions. Motivated by the conservation background of the exhibition developers, an effort was made to find practical and interesting ways to deal with the objects. One side of one vitrine incorporated a cutaway view so that visitors could see how it was constructed.

Assessment

According to interviewees the exhibition process was clearly facilitated by the guidance provided SCMRE by the A&I Exhibits Office director and the dedication of the SCMRE team to follow guidelines and meet schedules. Thus, for example, all of the schedules for the 410 Review were met and only minor changes had to be made. As one non-SCMRE interviewee noted, it was “a positive experience overall; they (SCMRE) were a great group to work with.”

When the exhibition opened at the A&I building, in September 2000, the whole process from conception to finished exhibition, had taken approximately one year. Feedback from visitors was not included in any of the planning and the responses of visitors to the exhibition were not studied. Attendance at the related programs was modest, but the participants were described as enthusiastic.

ATTACHMENT A.

TIMELINE SUMMARY BY KEY STAGES: *SANTOS*

BACKGROUND

- SCMRE's director suggests a small exhibition, *A Closer Look at Santos* to be shown the Saisset Museum, Santa Clara University, California (early 1999)
- *A Closer Look at Santos* take place in California (May-August, 1999)

IDEA GENERATION & INITIAL FUNDRAISING (3 MONTHS)

- SCMRE staff develop the Santos exhibition idea (fall 1999)
- An initial proposal is submitted to the A&I Exhibits Office (October 1999)
- The exhibition idea is approved (December 1999)
- Funding - \$95,000 – is received from the Latino pool (February 2000)
- The opening is scheduled (September 2000)

FUNDRAISING, DESIGN DEVELOPMENT, FABRICATION AND INSTALLATION (9 MONTHS)

- Consultant unsuccessful in raising funds for exhibition (January- April 2000)
- Contracts awarded for design, graphics, and computer interactives (March 2000)
- All of the loan agreements are received (Summer 2000)
- Additional funding - \$25,000 – is received from the Latino pool (September 2000)
- Exhibition opens September 17, 2000

CLOSURE AND TRAVEL

- Exhibition closes in A&I Building (March 31, 2001)
- National Hispanic Cultural Center, Albuquerque, New Mexico (June 22, 2001 - November 4, 2001)
- Exhibition furnishings (computers, vitrines, light boxes, hygrometers, and text and graphic panels transferred as a gift to Museo de Arte de Puerto Rico San Juan, Puerto Rico (7 November 2001)
- Museo de Arte de Puerto Rico San Juan, Puerto Rico (December 14, 2001- June 9, 2002)

ATTACHMENT B.

EXHIBITION RELATED ACTIVITIES: *SANTOS*

PROGRAMS

January 6, 2001, *Meet the Santeros*, A&I Building, Smithsonian Institution

August 5 - 7, 2001, *Materials Used in the Making of Santos*, College of Santa Fe, Santa Fe, New Mexico

August 4, 2001, Family Day: *Preservando los Santos*, National Hispanic Cultural Center, Albuquerque, New Mexico

SPECIAL VISITORS [A&I BUILDING]

Alumni of Santa Clara University

Fellow of the Congressional Hispanic Caucus

Members of Institutes of Museum and Library Services

Members of Puerto Rico Community Center at Philadelphia, PA

Members of the review committees from SCMRE

Staff of Department of Commerce – part of Hispanic Heritage Month Celebration activities

The Friends of Atlanta International Museum of Arts and Design

Director, Atlanta International Museum of Arts and Design

The Smithsonian National Latino Initiatives Board

CASE IV.

Buccellati: Art in Gold, Silver, and Gems

Introduction

For a four-month period in 2001, the special exhibition gallery on the rotunda of the National Museum of Natural History (NMNH) had the overall ‘look’ of an elegant store featuring jewelry created in the Italian Classical and Baroque styles. *Buccellati: Art in Gold, Silver, and Gems* was the name of the exhibition. To the right of the exhibition entryway was a well-appointed 930 sq. ft. museum store themed as “Essence of Italy,” where visitors could purchase jewelry from \$.50 trinkets to a \$22,000 necklace, as well as a 150-page book/catalog, published by Skira, describing and illustrating the collection.

Exhibition Description

Buccellati: Art in Gold, Silver, and Gems was at NMNH from October 21, 2000 - February 25, 2001. This exhibition was based on the private collection of Buccellati, an Italian jewelry and design firm established in the mid-eighteenth century and re-established by Mario Buccellati in 1919.

The exhibition presented more than 75 jeweled and precious metal pieces -- candlesticks, chalices, jeweled bracelets and necklaces. Throughout gold and silver mixed with sparkling gemstones, including sapphires, diamonds, rubies and emeralds. For instance, the 1975 “Cup of Pleasure,” a chalice made from three pieces of rock crystal, was embellished with 32 rubies and 53 emeralds. Another example was the “Phoenix brooch,” the body of which is made from a rare, 236-carat pearl mounted in white and yellow gold. Fourteen large gemstone and jewelry pieces designed for the Buccellati family’s personal collection were shown. An elegant tiara, created by Buccellati in 1929, was displayed, as well as a pocket watch with chain and pencil-holder, which the elder Buccellati used. The exhibition included an original piece, the “Smithsonian Cup,” created by the 20th century founder’s son, Gianmaria Buccellati, in honor of the exhibition and donated to the NMNH permanent collection. The cup, made from agate with intricately engraved yellow, white and rose gold was set with pearls. Gems and minerals from the NMNH collections complemented the exhibition. The exhibition occupied a 5,000 square foot area.

“In mounting this exhibition, the Smithsonian pays tribute to one of the most revered names in jewelry and design,” said the then director of the National Museum of Natural History. “The Buccellati influence on art and design has been prodigious. As this landmark exhibition will show, the Buccellati esthetic, based on centuries-old Italian traditions, remains a vibrant presence in contemporary design.”

Exhibition Origin

The original concept for the exhibition arrived at the museum with strong incentives for both the Buccellati family and the NMNH to work out an agreement. A representative of the Buccellati family proposed the exhibition to NMNH. At the time the exhibition was first suggested, in an April 1997 letter, the exhibition was already partially assembled, since the Buccellati family had sponsored exhibitions in Canada (the Royal Ontario Museum) and Hawaii. The proposal was for the exhibition to come to NMNH after Hawaii. Over a year later, in a follow-up later letter, the museum was told that new pieces of stone carvings and metal work had been added to the planned NMNH exhibition since the initial contacts.

From the perspective of the Buccellati family, the exhibition would provide visibility and add to the “luster” of its business in the United States. While Buccellati’s business motives and perspective were clear, NMNH’s participation required a sensitive review. The museum wanted to ensure, as with other similar proposals, that the exhibition’s presence at NMNH was more than just a way to increase the value of a commercial product. Consequently, NMNH reviewed the objects proposed for the Buccellati exhibition and the plans for these objects in the future. The museum concluded that the objects would not be put on the market, since they mainly comprised the family’s personal permanent collection. When it was proposed, the NMNH exhibition schedule also showed an opening that could readily accommodate the exhibition. In addition, according to several staff members, jewelry shows have always drawn audiences and increased store sales (e.g., the Van Cleef & Arpels exhibition in the late 1980s, which displayed diamonds). Since Buccellati could be a good fit with the schedule and space, was probably an audience draw, had the potential of increased museum shop sales, and was accompanied by financial resources, the proposal was accepted. The exhibition was perceived as “part of the museum’s mission and as an interpretation of NMNH’s stewardship responsibility to the National Gem Collection.”

The curator who was consulted about the exhibition supported it, as he saw the value of continued networking with Buccellati and its representatives as part of a collecting strategy. They could help him increase his contacts with individuals who could

contribute unique objects to the national collection. He met with Buccellati in early 1999 and, after that meeting, there was an agreement -- in principle -- for NMNH to host the exhibition. He discussed with the family the basic premise underlying the agreement “NH does the exhibition, with consultation from the Buccellati.”

For a period of almost two years, the exhibition existed only in intermittent correspondence and on the museum’s schedules. The actual exhibition agreement was finalized in late 1999. (A timeline is in Attachment A.)

Approval Process

In May 1997, shortly after the initial Buccellati contact, the museum’s associate director for public programs informed the executive staff, via e-mail, of the Buccellati exhibition and the major new gold piece that Buccellati would like to donate to the collection as part of the negotiated deal. He wrote that the proposed “Smithsonian Cup” could be a “feather in our cap and a nice complement to the National Gem Collection” and that he thought NMNH should pursue the exhibition. The audience, collection development, and commercial aspects led to the approval of this exhibition.

Funding, Budget and Cost

The initial correspondence did not mention costs. The issue of costs was first raised in February 1999, about the time the curator met with the Buccellati. The museum’s exhibits department estimated the costs on the basis of prior exhibitions in the temporary gallery space and the scope and scale of the project at about \$400,000. The family representative was “quite shocked” at the amount and began to look for sponsors. He kept the museum well informed of possible sponsors and reported on contact with Italian government cultural groups and foundations. The museum also wrote several solicitation letters (e.g., to the Washington-based Italian Trade Commission).

As part of the on-going discussions, NMNH agreed to cover most of exhibition-specific costs; the non-exhibition costs, as well as a few exhibition costs, would be paid by the Buccellati family and business. NMNH paid for the design contract, space preparation, fabrication and installation; the Buccellati family paid for bringing the objects to the museum (shipping and insurance), photos of these objects, and the exhibition video. The funding negotiations looked at economizing every aspect of the project. For example, the Buccellati family originally suggested that NMNH modify and use the brochure designed by the host museum in Honolulu. However, the Buccellati family then decided to pay for a redesigned brochure. Approximately 25,000 copies of a 31-page, full-color glossy

brochure with 20 color plates were produced.

NMNH had planned to use approximately \$400,000 in federal funds, available from appropriated exhibitions budgets, to cover the museum's entire cost for *Buccellati*. However, some of these available funds were used to cover a budget shortfall for another temporary exhibition. The museum tried to raise *Buccellati* funds, but without success. NMNH originally expected money from the Italian Trade Commission, which it did not get. Additional funding was to come from the Japanese Frontier Association, to help with the costs of sending the exhibition to Japan, the exhibition's next venue. These funds did not materialize. The Buccellati family paid ancillary costs such as the public relations and advertising, social events, the catalogue, the banner, and concerts. Looking only at museum exhibition costs (design and production), the NMNH estimated budget at the time specifications were written for a design contract was for \$412,000; final costs were about eight percent less, or \$380,000.

As noted, one of the reasons for accepting the exhibition for NMNH was the potential of shop sales. The shop (931 sq. ft.) was adjacent to the exhibition, in the same space as the *Vikings* shop that preceded *Buccellati*. This space re-use meant reduced costs in setting up the shop. To entice visitors, a window was put into the wall separating the exhibition from the store. Unlike most Smithsonian shop arrangements, the Buccellati products were brought in on consignment. NMNH would only pay Buccellati for items that were actually sold. Usually the museum shops buy from the manufacturer and keep unsold products. In this case, the inventory would be too costly. In addition to Buccellati jewelry, the store brought in related products at lower price points. However, after all the expenses of operating the store were accounted for, there were no profits to distribute to the museum.

Organizational Structure and Responsibility

At NMNH, *Buccellati* was assigned to the chief of special exhibits, working directly for the associate director for public programs. The chief assigned a project manager/exhibition developer who had the responsibility of developing and tracking budgets and schedules, developing the requests-for-proposals and helping select contractors, commenting and helping with scripts, text labels, etc.

Several years ago, NMNH downsized and downgraded its design staff, leaving two graphic designers on board. For its exhibitions, NMNH uses contractors and the Office of Exhibits Central (OEC). In this case, OEC was not available and a design contractor was used. The same outside firm designed both *Vikings*, the subject of another case

study, and *Buccellati*; the lead designer of this firm previously worked at the museum and was familiar with its requirements. Because the firm was on the SI Open Term Contract (OTC) list, it was able to bid on individual exhibitions. The design contract was awarded in May 2000, by mid-June a schematic design was available and one month later, in July 2000 construction drawings for space preparation were completed.

The core exhibition team consisted of the project manager, two members of the design firm, and the curator. Staff in special events and public relations were also assigned responsibilities. A program assistant in the office of the associate director for public programs acted as a liaison with the Buccellati family and company. The education and internal design staff were not involved in the exhibition. At NMNH, a bracket maker, audiovisual and lighting staff and the cabinet shop assisted with the installation.

Concept and Design Development

In designing *Buccellati*, the contractor worked under several constraints. The requirements from NMNH were, first, to utilize as much of the existing wall configuration as possible from the previous exhibition. *Buccellati* was not a high budget exhibition, so the contractor was asked to keep it as economical as possible. (The basic design contract for *Buccellati* was \$54,000.)

Initially, the museum presented the exhibition to the contractor as one that had been to two other venues and had a well-defined set of objects, such as candlesticks, chalices, etc. That was basically true. However, as mentioned, the Buccellati family decided to add some new jewelry to the exhibition and expand it. Also added were Buccellati reproductions of historic Italian cups. These changes added to the complexity of the exhibition and affected staff time, cases, security, etc. The text that accompanied prior Buccellati exhibitions also needed revamping, to edit out commercialism and add interpretation. The text was augmented and edited by the design firm. According to one interviewee, the contractor and museum staff “worked on having a slight overlay of interpretive materials, but the exhibition is mainly an ‘object show.’” The design contractor hired a freelance graphics designer to work on the graphic panels and an artist to create paintings that were later imaged on scrim.

The scrim were meant to evoke a “sense of place” in Europe and show that the graphics, decorative motifs, and colors derive from the Renaissance tradition. The exhibition was described as “an art gallery installation, lighting controlled and focused, with an attempt to make those jewels very sparkling.” It had a limited color palette that comes out of the jewel work itself and that the Buccellati enjoy.

The original design called for fresh flowers on a large table in the exhibition. This touch was a very important aspect in creating the sense of scale and feeling. One interviewee said, that the “scene of opulence and grand scale depended on the table and flowers. Yet, you may never have seen the exhibition with fresh flowers. SI and the Buccellati family promised fresh flowers. Only this week have they [SI] agreed to put flowers in all the time.” Logistics and costs meant that flowers were rarely in the space. The responsibility for paying for the flowers was unclear. Apparently, NMNH intended to ask the Buccellati family to pay for them, but failed to do so.

According to several interviewees, the *Buccellati* exhibition was “not driven by a curator,” and thus, there was considerable design flexibility and freedom; this was quite different from exhibitions, such as *Vikings*, where there was a heavy interpretative presence.

Fabrication and Installation

Most of the fabrication for *Buccellati*, like other NMNH projects was contracted. NMNH also contracted with a general contractor for space preparation. As a cost saving measure, the fabrication contractor was asked to utilize a number of existing cases stored in a NMNH warehouse in Columbia, MD. Approximately 18 of 27 total cases were refurbished and recycled for *Buccellati*. The fabrication contractor built one new case and installed most of the exhibit elements. The general contractor and the NMNH cabinet shop built the rest (primarily built-in wall cases). The project manager and the bracket maker installed the objects.

One of the challenges of fabrication and installation was to economize as much as possible. Several decisions lowered the costs below the estimates. For example, less expensive finishes were used, some of the detailing was simplified, and a different installation technique was used for hanging the scrims than originally planned. The museum also put in considerable effort in locating an inexpensive firm for producing the scrims.

Marketing and Promotion

Promotional activities for *Buccellati* began about six months before the opening, a time considered too short by museum personnel. The public relations staff first heard of the exhibition in late March 2000. In addition to a number of staff departures, staff was working on promotions for another jewelry exhibition scheduled to open one week

earlier, the *Dresden Green* diamond, which opened on October 13. They had apparently been told that the Dresden Green was “the office’s number one priority in the spring.”

The first meeting with NMNH special events personnel about *Buccellati* was held in mid-May. At that time, the opening was scheduled for October 19, 2000. The Buccellati family provided a coordinator to help with press and events and details of the exhibition. The coordinator had a “to develop Buccellati public relations and get the NH name out.” Because the Buccellati have a low-key clientele and undertake minimal advertising, they relied on the museum for handling public relations and advertising. As an initial step, the exhibition was announced at a luncheon held at the New York City Buccellati store (July 2000). A Buccellati plan to host both a luncheon and evening events in Los Angeles for Buccellati clientele did not work out primarily because of timing and low acceptance rates.

Several promotional events were held in conjunction with the opening on October 19, 2000. These included a press conference with continental breakfast, a black-tie evening event, and a concert. The audience at the evening event was “a well-dressed crowd, black-tie and glittering, and one that doesn’t usually attend NMNH events.” The turnout, 600 out of 1,200 invitations that were sent, is considered very good. Staff estimates the opening event cost the Buccellati family about \$100,000. In an article noting both the Armani exhibition in New York and the Buccellati exhibit, Italian *Vogue* said, “To underline the significance of these events, a reception was offered in honour of Gianmaria Buccellati in the new Italian embassy in Washington. Great satisfaction not only for the Buccellati family, but also for the entire craft tradition of Italy and Milanese entrepreneurship.” The exhibition was described as “under the Patronage of the Smithsonian Institution in Washington.”

Gianmaria Buccellati also commissioned the Italian composer and cellist, Giovanni Sollima, to create a piece in honor of the House of Buccellati. “Travels in Italy” premiered on October 17, 2000 in Carnegie Hall by a well-known string quartet, The Lark Quartet. The concert was repeated on October 21 at NMNH’s Baird auditorium, the Saturday public opening of the exhibition. The Smithsonian Associates (TSA) sent invitations and advertised the concert in that month’s TSA program catalog. The timing of the decision to repeat the concert at Baird did not allow for an earlier posting. As a result, few tickets were sold. Gianmaria Buccellati, the firm’s patriarch, had suggested that the quartet use the National Museum of American History’s (NMAH) Stradivarius violins in the concert. Buccellati was disappointed by the lack of response from NMAH to NMNH’s request for the use of the violins.

Exhibition Closing

According to interviewees, the exhibition process was straightforward and few problems were encountered. Museum staff, the Buccellati family, and contractors met all of the schedules.

The only minor point of contention was the closing date of the exhibition. The Buccellati had hoped that the exhibition could extend well into spring 2000 and, initially, the museum thought this was feasible. The exhibition had to close, however, by late February due to exhibition rotations involving several museums. The NMNH traveling exhibition *Vikings* was scheduled to travel to the Natural History Museum in Denver. Denver, at the time, was hosting *Voyages of Discovery* from the Natural History Museum in London. Some shuffling of traveling exhibits and venues had to be arranged, since *Voyages* was scheduled to come to NMNH after Denver. Bringing *Voyages* to NMNH a little early made it possible for Denver to receive *Vikings* in a timely fashion. This meant deinstalling *Buccellati* earlier than originally discussed but not before the published closing date.

From the point that the NMNH curator went to discuss the *Buccellati* exhibition with the family in (early 1999), the exhibition process at NMNH took a total of about 18 months.

Exhibition-related Activities

Aside from the events surrounding the exhibition opening, one event was held in conjunction with the exhibition. On January 26, 2001, the Buccellati representative who first brought the exhibition to NMNH gave a public lecture in Baird Auditorium, “The Art of the Goldsmith.”

Assessment

Feedback from visitors was not considered in any of the planning and the reactions of visitors to the exhibition were not studied.

As part of NMNH’s exhibition program, *Buccellati* accomplished several purposes. Like previous jewelry exhibitions, it attracted a reasonable audience. One interviewee commented that it “proved the importance of popular (as opposed to ‘scholarly’) exhibitions filled with aesthetically pleasing objects.” As part of a collection enhancement strategy, the museum received a valuable addition, the “Smithsonian Cup,” generated good will and potential access to other donors. The exhibition was relatively

easy to accommodate in the schedule. It was installed at relatively low cost, in part because of minimizing construction and recycling vitrines.

According to every staff member interviewed, the Buccellati family proved to be an accommodating sponsor. From the start, they acknowledged that “exhibition making” was the museum’s purview and that they had an advisory, but not decision-making role. Although none of the funding arrangements were formalized, there were no disagreements and, in fact, they paid for additional items (e.g. new brochures).

ATTACHMENT A.

TIMELINE SUMMARY BY KEY STAGES: *BUCCELLATI*

BACKGROUND TO IDEA (20 MONTHS)

- A representative for the Buccellati family proposes to NMNH a Buccellati exhibition at the “Smithsonian museum” (17 April 1997)
- Intermittent correspondence between the Buccellati family and NMNH about the exhibition idea (April 1997-January 1999)

PLANNING (10 MONTHS)

- Curator visit to Buccellati and “in principle agreement” (early 1999)
- Exhibition agreement finalized in late 1999

DESIGN DEVELOPMENT, FABRICATION AND INSTALLATION (9 MONTHS)

- NMNH staff begins to develop exhibition (January 2000)
- Designer contracted (3 May 2000)
- Final design (17 July 2000)
- Fabrication and installation (28 September -October 19 2000)
- Exhibition opens at NMNH October 19, 2000

CLOSEOUT

- Exhibition closes February 25, 2001

CASE V.

Fountains of Light: Islamic Metalwork from the Nuhad Es-Said Collection

Introduction

Since mid-September 2001, visitors to the Arthur M. Sackler Gallery can view *Fountains of Light: Islamic Metalwork from the Nuhad Es-Said Collection (Fountains)* on the museum's second level. The exhibition displays inlaid metalwork - from its origins in Iran and present day Afghanistan and Uzbekistan to its later developments in Syria, Turkey, Egypt, and Iraq. Here, based on interviews with gallery staff, is the story of the exhibition development process.

Exhibition Origin

In its overall exhibition plan, the Sackler staff tries to maintain a representation of all parts of Asia, rotating topics and media. Since much of the Sackler Gallery's collection is light sensitive, and cannot be on display for more than six months, the staff often looks outside the museum for longer-term temporary exhibitions. In 1996, the exhibition *Puja: Expressions of Hindu Devotion* was in the first year of its planned three-year presence in a gallery space used for rotating exhibitions. In reviewing plans for exhibitions to follow *Puja*, a senior curator at the Sackler Gallery proposed a display of a well-known collection of Islamic metalwork. If a loan of the Nuhad Es-Said collection could be secured, it would be an ideal choice.

The curator felt that if a loan agreement could be secured quickly from the family, an exhibition could happen in a relatively short time. A Smithsonian venue would provide this important collection with a visible venue, it would be the first time the collection would be seen in the United States, and it would also honor the collector, who had died in 1982. In addition, it would raise the possibility of the Sackler as a permanent home for the collection.¹⁰ Because the collection was metal, it could be exhibited for a three-year period; because it was in one location, loan and shipping logistics would be simplified.

¹⁰ As part of his review of exhibition and collection plans, the new director of the Sackler Gallery will explore future option for the collection

Since 1982, the Nuhad Es-Said collection was at the Ashmolean Museum in Oxford, UK, through a loan arrangement with the Es-Said family. It is widely thought to be one of the best collections of Islamic metalwork in the world. Over the years various museums had asked to borrow the collection, but were not successful. In 1991, the Sackler wanted to borrow some objects from the collection, but had been told that the collection had to remain together as one of the terms of the loan to the Ashmolean. In 1994-1995, the Sackler curator met a member of the Nuhad Es-Said family in another context, and mentioned in passing that if the family wanted to display the collection somewhere else, the Sackler would like to show it.

The curator made her formal query for the loan in 1998; probably because of the Smithsonian name and her own enthusiasm, she was able to get permission. The Es-Said family placed few restrictions on this loan and the exhibition. They asked that the collection remain together and that the curator use the information from the existing catalogue in developing an exhibition.

Approval Process

The then director of the Sackler Gallery and his deputy discussed the proposed exhibition with the curator before she contacted the Es-Said family. They, and several other colleagues, were enthusiastic about the idea. After the loan was assured, the initiating curator for *Fountains* wrote a draft proposal and shared it with the deputy director for comments and reactions in April 1999. The curator made minor revisions and the proposal was reviewed and approved by the Exhibition Review Committee. The focus of this review is on content, schedule and appropriateness for the gallery. This was followed by a presentation to all the department heads that would be involved in implementation. Curatorial, design, education, public affairs, and development departments were involved, as well as publications, collections management, conservation, photography, shops, digital information services, the exhibitions coordinator, chief curator, and the director's office.

At this presentation, the goals for the exhibition, highlights, catalogue and outreach ideas were discussed. In the discussion, as a cost saving measure, the participants decided not to prepare a visitor brochure. Instead, the existing catalogue would be available for purchase by visitors. The department heads then, in turn, were asked what they would need to do their part in making the exhibition happen. For example, did they envision specific schedule or resource problems?

After the department heads laid out their requirements, an initial budget of \$127,000 was drawn up in August 1999.¹¹ When showing a private collection, the gallery does not raise funds and the expenses come from the Sackler Gallery's internal budget. For Sackler Gallery exhibitions, the amount was considered relatively modest. With both a working budget and proposal in hand, the Core Review Committee approved the installation in September 1999.

Funding, Budget and Cost

In the case of *Fountains* every effort was made to minimize costs. Since the objects were all in one place, assembling the contents was relatively simple and inexpensive. The shipping costs were straightforward; the objects went directly from The Ashmolean Museum of Art and Archaeology (at the University of Oxford) to the Smithsonian with the gallery's registrar. Since this collection did not require extensive internal study, research costs were low. To minimize demolition and construction costs, the gallery decided to keep the exhibition space essentially the same as that of the previous exhibition (*Puja*).

Excluding gallery personnel costs, after additional information was available, the approved/allocated budget of \$100,700 was below the initial estimates. The "closeout" budget shows actual costs of about \$80,000. One reason is that the construction contractor's bid came in low. According to staff, this 8A firm was obviously trying to get a chance to show that they could do quality work for the gallery and thus submitted a low bid. In addition, less expensive materials than originally planned were used; for example, linen instead of ultra suede as case liners. Other major categories that showed cost decrease are demolition/construction; signage and labels; casework; construction contingency (not needed); and VIP travel. If we restrict the expenditures to direct exhibition costs as defined in a survey conducted by OP&A, excluding publications, brochures, public programs, and advertising, the costs were about \$60,000.¹²

¹¹ As noted, a budget does not accompany the initial presentation to the Exhibition Review Committee since the focus of that committee is on content and because the details needed for budget development are not available until after a discussion with department heads.

¹² Costs as defined in the OP&A survey, conducted as part of the exhibition study, include only exhibition-related costs and do not include: in-house staff (which most units do not track), overhead costs, publications, brochures, public programs, and advertising. Direct costs cover such things as contracts (e.g., design and fabrication) and other out-of-pocket expenses.

Organizational Structure and Responsibility

With an exhibition as small and as uncomplicated as *Fountains*, the organizational structure was straightforward. The curator was clearly the head of the project and responsible for consulting with, reviewing and approving the work of design, public relations, the registrar, and others.

In this exhibition development process, the education department did not have a role for several reasons. The curator felt that since the exhibition is “semi-permanent” (minimum of three years), educational programs could evolve during the three-year period. The education department had staff shortages at the time and, because its director was new, the department was in the process of redefining its role with respect to exhibitions.

Prior to 1998, responsibility for shepherding exhibition ideas through to completion, and tracking schedules and budgets, was assigned the lead curator. In July 1998, the Freer and Sackler Galleries hired a full-time exhibition coordinator, who is responsible for tracking exhibition budgets and schedules and alerting various gallery personnel if delays are encountered or special problems occur. She views her position as the hub of exhibition activities, “the person with the larger picture” who makes sure that information comes in and is disseminated widely to all “who need to know.” *Fountains* was one of the first exhibitions that the coordinator tracked through the planning, implementation and opening. She reports to the deputy director.

There has been a warm relationship between the lender and the Sackler Gallery. The curator kept Mrs. Es-Said informed as the development went along, by sending her floor plans, writing about the design, etc. She asked Mrs. Es-Said to approve the text for the opening panel, because it discussed the collector, her late husband. Mrs. Es-Said made no changes and expressed her trust in the curator whom the family has known for over a decade.

Concept and Design Development

The Sackler and Freer Galleries have an in-house design capability, including two designers, one of whom is the Design & Production department head. The department has a total of about 15 people (design, graphics, lighting specialist, etc.) The department began work on *Fountains* in June 1999 with a preliminary design for the existing space configuration.

Graphics were used to fill the space, because all the objects needed to be spaced out; the designer believed that the exhibition could have been installed in a smaller gallery. To facilitate viewing and to utilize the space, text panels and labels are on the walls instead of on the object cases. In designing the exhibition, the designer relied on photographs and information on the dimensions of the objects found in the catalogue, rather than visiting the Ashmolean (again saving money). To display the objects, as much as possible ‘in the round,’ the built-in cases from the previous exhibition were closed off and not used rather than removed. The new cases, with the decks (or bottoms) lower than the Americans for Disabilities Act (ADA) standards, allow for extensive school group use. Mirrors below and above objects highlight the entire surface of the metalwork. Although the Sackler and Freer Galleries are always sensitive to ADA requirements, there are exhibitions – such as *Fountains* – where special design accommodations are made to enable extensive school group use. The curator and the designer, based on the *Art of the Persian Courts* exhibition shown at the Sackler (from November 1996-March 1997), selected the dark burgundy color for the walls jointly. The color was selected to make the space more interesting and provide a “jewel like” background. The burgundy presented some fabrication problems as noted below.

Fabrication and Installation

As mentioned above, the design department awarded a construction contract; in turn, the contractor awarded sub-contracts for painting and drywall. Painting was somewhat complex, as it took six coats to cover the existing textured paint and new dry wall. Other contractors were involved in mount making, vitrine building, and creating the three large photomurals. The curator wrote the exhibition script. In using the catalogue to create the exhibition text, the curator changed a few terms that differed in use between the UK and the US. She also checked some of the facts in the catalogue and was satisfied as to their accuracy. Additional curatorial research was involved, as this is the first exhibition of metalwork in the United States and the first that also explains the techniques involved in creating the works of art in the exhibition.

The 410 Review Process, delegated to the gallery, was simple as items such as egress, fire safety, etc. were carryovers from *Puja*.

Aside from attending the initial meeting, the registrar was first involved in about June 1999, several months into the process. He did not visit the Ashmolean to look at the objects, as another conservator had seen the collection previously, and he made most of the arrangements long distance. The registrar arranged with a London packer, with whom the galleries had prior experience, to prepare crates. In late May 2000 the registrar

went to Oxford, conducted the condition report, oversaw the packing and brought the items back with him in June 2000. After the conservators and curator reviewed the items, they prepared a conservation proposal that was signed-off on by Mrs. Es-Said. The registrar's costs were about 10% lower than the budgeted \$10,000, including crates. An additional \$4,000 was budgeted for returning the objects and is being held aside.

After the preparatory work was completed, the straightforward installation of the objects only took 2.5 days.

Marketing and Promotion

Promotional activities for *Fountains* began about three months before the exhibition opened, somewhat later than is usually the case at the Sackler Gallery. At the time, the public affairs office staffing was in transition, although the former director had included an \$18,000 line item in the original exhibition budget for advertising. In May 2000, the deputy director met with the lead curator to discuss the exhibition, images for publicity and the exhibition's name. The working title was *The Nuhad Es-Said Collection*. Shortly thereafter, the curator proposed a modification, *Fountains of Light: The Nuhad Es-Said Collection*. Further discussion led to the current title, *Fountains of Light: Islamic Metalwork from the Nuhad Es-Said Collection*. The title was not tested with the public, but it was approved by the deputy director and director.

A press release was sent out in mid-July 2000, announcing the September 13th opening date. At the same time, images of objects were posted on the gallery's website. The internal design staff developed a backlit poster for installation at Metro stations; the Publications department staff designed the press preview invitation and packet. The poster is also used between major exhibitions in some backlit cases available to the Sackler. The press preview was held September 12, 2000. About 25 newspapers sent reporters to the press preview, including 10 from foreign papers. The press presence was about average for a small Sackler Gallery exhibition. Only the *Washington Post* reviewed the exhibition.

About 300 people attended the exhibition's opening. Fifteen members of the Es-Said family attended the opening, including some from Beirut, and "were thrilled with it."

Activities Related to the Exhibition

As detailed in Attachment B, *Fountains* enjoyed some press coverage when it first opened. A review in *The Washington Post* was especially favorable. The experience in the gallery is being supplemented with gallery programs, e.g. *ImaginAsia*, gallery talks, lectures and films.

The Sackler Gallery is selling a catalogue about the collection. It was initially published in 1982 and reprinted in 1999. According to interviewees, the catalogue is scholarly and rather expensive compared to average catalogues (\$90).

Assessment

Without exception, every person interviewed about this exhibition commented that it was a “model exhibition” based on a complete collection from the outside. The loan was easy to negotiate, the available catalogue provided accessible information for the text, the design was straightforward, and the objects easy to transport. One staff member said, “In one year everything was in place to make the exhibition come together: space, a curator, a great collection, and a budget.” In another six months, the exhibition opened. The exhibition also provided the then newly hired exhibition coordinator with an opportunity to develop her role at the Freer-Sackler Galleries within the context of an uncomplicated exhibition. Other staff members involved did not find the exhibition especially challenging or one that gave them an opportunity to experiment with new approaches or exhibition-making processes within their specialties.

Feedback from visitors was not considered in any of the planning and the responses of visitors to the exhibition have not been studied.

ATTACHMENT A

TIMELINE SUMMARY BY KEY STAGES: *Fountains of Light*

BACKGROUND TO IDEA

- Sackler gallery unsuccessfully tries to request a loan of a few pieces from the Es-Said collection (1991)

- Query to the Es-Said family requesting the loan of their collection (1998) for this exhibition. [The awareness of its desirability, first mention to the owner, and first request to borrow pieces by the Sackler Gallery occurred much earlier.]

CONCEPT AND EXHIBITION DEVELOPMENT (ABOUT 11 MONTHS)

- Proposal written (March – April 1999)
- Exhibition Review Committee approves proposal (4 May 1999)
- All departments develop preliminary design and cost estimates (June-July 1999)
- Working budget with gallery-wide input complete (30 August 1999)
- Core Review Committee approves installation (7 September 1999)
- Loan agreement out to owner for signature (October 1999)
- Loan agreement signed by Mrs. Es-Said (22 February 2000)

DESIGN DEVELOPMENT, FABRICATION AND INSTALLATION (ABOUT 7 MONTHS)

- Director's review/final design approved (4 April 2000)
- Registrar travels to Oxford, brings collection back (May 2000)
- *Puja* closes, gallery preparation begins (9 July 2000)
- Installation of art (21-23 August 2000)
- Installation of graphics and lighting (24 Aug-8 Sept 2000)
- Opens on time, as scheduled and below budget (17 September 2000)

ATTACHMENT B

EXHIBITION RELATED ACTIVITIES: *FOUNTAINS OF LIGHT*

SPECIAL EVENT

September 22, 2000. Opening reception and dinner for the lender.

EDUCATIONAL PROGRAMMING/WEBSITE

ImaginAsia Programs

November 2000, every Saturday and Sunday.

August 2, 7, 8, and 9, 2001.

November 2001, every Saturday and Sunday

August 20, 21, 27, and 28, 2002.

Children ages six to fourteen and their adult companions explore the exhibition *Fountains of Light* using an activity guidebook to discover the technique, design motifs, and utilitarian function of the gold and silver inlaid objects in the Nuhad Es-Said Collection.

Participants return to the education classroom and use gold and silver metallic papers to create pendants that reproduce the effect of inlaid metalwork.

Educational Newsletter [Spring 2001 newsletter]

The exhibition was featured in the museum's newsletter highlighting programs for teachers and students and includes lesson plans and curriculum connections for language arts, social studies, mathematics and science.

Online Guide for Educators

This online version of the Educational Newsletter feature includes links to an online description of the exhibition, a map of the Islamic world, lesson plans, and more.

<http://www.asia.si.edu/edu/essai/intro.htm>

FILMS

November 12, 2000

"Date Wine" (1998, directed by Radwan El-Kashef)

December 2, 2000

"Um Kulthum: A Voice Like Egypt" (1996, directed by Michael Goldman), introduced by ethnomusicologist Josef Pacholczyk.

LECTURES

April 17, 2001

"Fountains of Light: Islamic Metalwork from the Nuhad Es-Said Collection."

Talk for the Smithsonian Associates by the exhibition curator, Massumeh Farhad.

Thursday, December 7, 2001

"Sultans, Sufis and the Stars: Inlaid Metalwork from the Nuhad Es Said Collection."

Lecture by James Allan, Keeper of Eastern Art at Oxford University's Ashmolean Museum and author of the exhibition catalogue.

"Point of View" Gallery Talks (informal talks in the galleries)

Tuesday, October 10, 2001

Massumeh Farhad, Associate Curator of Islamic art, discussed the historical, cultural, and political importance of the art of inlaid metalwork from the Islamic world.

TOURS

Between February and June 2002 visitors have joined nearly twenty tours (reserved and walk-in) centering on or including the Fountains of Light exhibition.

MEDIA COVERAGE

Washington Post, “Metalwork That Pour Forth Their Spirit: Islamic Objects, Leading Charmed Lives” Sunday, September 17, 2000; Page G01).

Newspaper of the George Washington University. October 17, 2000. Exhibition listing with photograph.

Digital City. September 29, 2000. Exhibition review with photograph

Lapidary Journal. October 1, 2000. Exhibition listing with photograph.

The Washington Post. September 17, 2000. Exhibition article with photographs.

The New York Times. September 17, 2000. Exhibition listing.

The Washington Post. September 10, 2000. Fall arts preview--exhibition listing with photograph.

The Washington Post. September 9, 2000. Exhibition listing with photograph.

The Washington Post. September 8, 2000. Exhibition listing.

Prince George’s Post. August 24, 2000. Exhibition listing with photograph.