

Finding Clarity in Collaboration:  
Practitioner Perspectives of Collaborative Exhibition Development

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A thesis  
submitted in partial fulfillment of the  
requirements for the degree of

Master of Arts

University of Washington

2018

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Program Authorized to Offer Degree:

Museology

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**Abstract**

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The purpose of this study was to describe practitioners' perspectives of new and different exhibition development models in art museums. The study focused on characterizing these models, and describing their perceived benefits, and challenges. Using a case study design, data were collected from 4 art museums through semi-structured focus groups, and analysis of exhibition documents. Findings suggest that art museum practitioners see these models as highly collaborative and democratic, with clearly defined processes and a consistent focus on visitor learning. The benefits of these models included a sense of personal buy-in for practitioners, and an overarching clarity of purpose for those involved in the exhibition development process. The results of this study offer the museum field an opportunity to understand collaboration and participatory design in exhibition development, and the impacts of such a process on those involved.

### **Acknowledgements**

I would like to thank the many people who have helped make this thesis a reality. Dr. Jessica Luke, thank you so much for your enthusiasm, motivation, support, and feedback. I could not have done this without you. Thank you to my committee members, Judy Rand and Julie Johnson. Thank you for taking the time to guide me and inspire me. Thank you to all my research participants, your responses were invaluable and I am thrilled to have had the chance to work with you all.

Thank you to the University of Washington Museology department for giving me the chance to explore my interests and passions, and for all the help and pizza along the way.

Finally, I would like to thank my family and close friends who supported me throughout. It's been a wild ride, and I'm honored we shared it together!

To my husband, Godwin, there will be cookies after the defense. I love you. Thank you.

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## Chapter One: Introduction

A museum's frontlines, so to speak, are its exhibitions. They are a tangible culmination of all aspects of a museum's work, and are the primary way the museum manifests its mission for the visitor (Smithsonian, 2002). This sentiment is especially true for art museums, given their strong focus on objects.

Traditionally, exhibition development in art museums is often a solitary process, originating with an idea from a single curator with a particular realm of expertise, implemented by a designer, and later installed by a fabricator (Kamien, 2001; Smithsonian, 2002). This traditional model is rooted in the concept that the museological motivation for creating art museum exhibitions is to display objects and information to affirm the public's trust in these institutions as caretakers of knowledge (Dean, 2002). This sense of authority has led to a process of exhibitions often being developed in a scholarly vacuum in which the curator develops a concept and chooses objects to support that concept, then hands work down to supporting staff to realize their vision (Isble, 2010; Smithsonian, 2002). In this traditional model of exhibition development, there is little collaboration between the curator and other staff in the museum – education, marketing, and visitor services, for example – and there is little exhibition evaluation in which ideas, concepts, and designs are tested with visitors as an exhibition is developed.

There has been a broad transformation in the field of museology in which we have seen a paradigmatic shift in how museum professionals view the purpose of the museum, and the role of the visitor within it. Much of this shift has been inspired by pioneering practitioners at children's museums, science museums and others (Spock, 2013), as well seminal works that describe it, such as *From Being About Something To Being For Somebody* by Stephen Weil (1999), which sought to describe the field-wide shift from museums being about things to

museums being about people. Given that shift, the curatorial model that we are familiar with may be rendered unsustainable (Iversen & Dindler, 2014; Villeneuve, 2012). As a response to this shift, many museums are taking on new and different methods that stimulate cross-departmental collaboration, and invite museum staff to work closely together to meet visitor expectations.

Within the field of design, participatory design is a model that seeks to democratize the design process by attempting to involve all stakeholders, be they colleagues, partners, or end users (Hester & Lawson, 2017; Iversen, Halskov & Leong, 2012). The participatory design process is rooted in the core value of creating meaningful and equitable environments and products for the people they serve. This model appears to align well with the emerging practices and innovations borne of the paradigmatic shift that is being seen in museums.

Recently, some art museums have begun experimenting with and utilizing alternative models of exhibition development that are collaborative, visitor centric, and even participatory. Institutions like the Oakland Museum of California have restructured their entire organization to focus their efforts on placing the visitor experience at the core of everyone's role. This model allows exhibitions to be developed cross-departmentally, as all departments are interconnected through the new organizational structure (Henry, McLean, & Oakland Museum of California, 2010). Another example of this shift in practice is the Santa Cruz Museum of Art and History where, under the leadership of Nina Simon, they have developed methods for exhibition planning that are inherently participatory (Simon, 2010). Being participatory, for Simon, means that hands-on, deeply involved museum experiences allow cultural institutions to reconnect with the public, demonstrate their relevance in the lives of the visitor, and empower their local and global communities. This is not unlike the participatory models of the design world.

While there is much research about exhibition development as a practice, the new and different strategies currently under way, and the perspectives of museum staff making these changes to more democratic processes of development, are under-researched. We know very little about their successes, challenges, sustainability, and obstacles.

### Purpose and Research Questions

The purpose of this study was to describe practitioners' perspectives of new and different exhibition development models in art museums. Three research questions drove this study:

1. What are the characteristics of these new models that make them different from the traditional, curatorial model?
2. What are the perceived benefits of these new models of exhibition development?
3. What are the challenges of implementing new development models, and the strategies used to mitigate them?

### Significance

This research may be used as a frame of reference for different ways art museums have developed exhibitions with visitor experience and learning at their core. Exhibit development teams may use this information to define success for their own work or institution, they may use this to build upon the work of others, or they could use this as a way to affect and lead change in an institution that may feel wary about undertaking a new approach.

## Chapter 2: Literature Review

The purpose of this study was to describe practitioners' perspectives of new and different exhibition development models in art museums. This research is situated in three areas of literature: a) paradigmatic shifts in museology, highlighting the shift from being focused on objects and curatorial vision to being about the museum visitor and the community in which the museum resides, and how that has affected exhibition development practices; b) exhibition development processes and the shift from traditional curatorial models to new areas of practice such as cross-departmental collaboration and team-based development; and c) the more recent forays by museums into areas of co-creation, open authority, and participatory design.

### Shifting Paradigms

The last thirty years have seen a shift in field-wide perceptions of the purpose of museums, with a focus on becoming more democratic, visitor-centric institutions (Anderson, 2012). Weil (1999) described the chronology and details of this change in museological thought and practice, from operating like a business that stores things in perpetuity to non-profit institutions that provide a breadth of educational services, as well as instruments for community engagement and change. This line of thinking is reflected in the discussions surrounding the museum's institutional authority, and the democratization of knowledge (Adair, Filene, & Koloski, 2011; Freedman, 2000).

Historically, museums have typically seen themselves as repositories for the things that made people and the surrounding world unique. The earliest museums were collections of curiosities, meticulously curated for fellow collectors and enthusiasts. In time these collections became more open to the general public, but the emphasis on the importance of the objects remained. Museological practice was focused on meeting the needs of the academic and

curatorial elite, by working in organizational models that were familiar and most comfortable to their specific academic disciplines (Cameron, 1971). Moreover, the content that was presented to the public was engineered towards fellow experts, making that experience exclusive to the curatorial elite, and not a welcoming place for the public.

The importance of that content expertise remains today as an essential part of museological practice, however, there has been a shift in how museums view the relationship between content that a curator finds interesting or valuable, and the relationship that the visitor has with that content. This shift is characterized by active attempts in repatriation and abandoning colonial viewpoints in exhibitions, by bringing more accountability into the museum profession as a whole, and relinquishing authority from curatorial hands to the hands of the museum visitors. This change is ongoing, but its origins come from post-war museum growth and the increased feeling that museums existed to serve the public, where in the past this was not a priority to the museum industry. Changes began to occur as a response to a decrease in governmental funds, which forced industry professionalization and the institutionalized standards in order to diversify their revenue. The professionalization of the industry had the incidental effect of forcing museum professionals to look at what they were presenting to the public, and ask themselves if that was enough (Weil, 1999).

Freedman (2000) said of this change in the nature of museum practice, “The market can no longer be controlled from a central point for only a few. It must be managed as a service for all...” (p. 306). This meant that museums could no longer operate as gatekeeper-like institutions, but must share the authority of knowledge and culture. The American Alliance of Museums (AAM) has made it a priority since 1992 that education and equity are at the core of what constitutes museological excellence. They did this by publishing their report “Excellence and

Equity: Education and the Public Dimension of Museums” which outlined what would become best practices for the educational and public service role of museums (AAM, 1992). These perspectives all share a key idea, that the importance of the visitor is central to the sustainability of the museum, and that every action taken by the museum contributes to their experience.

Falk (2009) explains the changing museum paradigm as a need to move away from viewing visitors as passive learners to respecting their individual motivations, their passions and their needs, and making the museum experience more personally validating. Creating the visitor centered museum requires moving beyond teaching the visitor about a topic, and engaging them in an experience that they will find meaningful, inclusive and fulfilling. The museum needs to provide entry points that will be accessible for a wider audience and address their motivations for visiting (Rand, 2000; Samis & Michaelson, 2016). This increase in access and participation in the museum experience constitutes a major shift away from the museum as a place for academics, to the museum as a place for the public.

Nina Simon’s (2010) book, “The Participatory Museum,” demanded attention not just on the visitor’s experience, but specifically on the ways in which the museum engaged the visitor and gave them chances to participate in the museum. Simon invited museum professionals to consider the effects of relinquishing control and opening the museum up to a participatory experience:

“Trusting visitors’ abilities as creators, remixers and redistributors of content. It means being open to the possibility that a project can grow and change post-launch beyond the institutions original intent. Participatory projects make relationships among staff members, visitors, community participants, and stakeholders more fluid and equitable. They open up new ways for diverse people to express themselves and engage with institutional practice” (p.3).

Such a shift in thinking about the role of the museum has resulted in a similar change in thinking about how exhibitions are developed.

### Exhibition Development Practices

Exhibitions are a major part of the museum experience. They are the interface between the museum and its public (Hancocks, 1984; Shettel, 2008). Historically, the role of museum exhibitions has been the objective presentation of knowledge and culture through collections (Dean, 1994; Hancocks, 1984; Klobe, 2012). In this model, exhibitions have been seen as educational and communication tools, carefully developed presentations of stories intended to educate the public, or as they were more historically, to share with fellow researchers (Hancocks, 1984; Perry, 2012). These traditional exhibitions are typically developed in a hierarchical way, often with a single curator in charge of the entire process (Bradburne, 1999; Kamien, 2001). However, a more contemporary view of museum exhibitions is as places for inquiry and curiosity, not didactics (Samis & Michaelson, 2016), which may demand a new model for exhibition development.

The tasks required to develop exhibitions are essentially the same across museums. Concepts are developed, generally by a curator or within a curatorial setting, the ideas are approved and objects are secured, and labels are written, for example. The differences between the curatorial model and the collaborative model lies in who has authority, where ideas can potentially come from, who is responsible for various tasks, and at what point in the process non-curatorial staff are made part of the process, and what parts of the process are considered more important than others (Bedford, 2014).

In 2012, the Office of Policy and Analysis at the Smithsonian Institution produced a white paper, which shared results from interviews with museum professionals across more than sixty museums, both inside and outside the Smithsonian institution. These professionals were interviewed on various aspects of exhibition-making, such as skills, structures, processes,

management and signals of success. The intent of the study was to determine whether “certain organizational structures and the related policies and procedures” (p.1) produced higher quality exhibitions. The study explores the purpose of exhibitions in both collections focused, traditional curatorial exhibitions and visitor experience focused exhibitions, the organizational structures in place, and the procedures that are borne from these different structures. Traditional curatorial models were defined as top down processes in which an idea came from a curator. Non-traditional models were defined as collaborative and sometimes visitor centered in nature.

The study looked at the types of procedures at different types of sites, comparing smaller sites and larger sites both within and across categories, and the types of roles, policies and procedures each of these sites produced based on the content and mission of each exhibition, and the mission of the institution as a whole. The study concluded that “No single overall exhibition-making structure guarantees the production of high quality, cost-effective and timely exhibitions” but that some models may work better than other in “certain situations” and that it is important to select the “appropriate model based on the nature of the exhibition and the talents and availability of staff” (p.27). They also state that museums need to retain flexibility to accommodate the varied nature of exhibition projects.

#### Traditional Curatorial Model

In practice, the traditional curatorial model is procedural and sequential (Dean, 1994; Smithsonian, 2002). Several authors chart the phases and sub-phases of exhibition development following similar processes of idea development, storyline development, design, and production (Bogle, 2013; Dean, 1994; Kamien, 2001; Klobe, 2012). The process starts with a curator coming up with an idea or concept for an exhibition, and then consulting with “stakeholders,” who are mostly described as museum leadership, board members, and only sometimes, visitors.

In the descriptions of this model, visitor consultation is not explained beyond simply thinking of them or looking to municipal census data (Bogle, 2012; Dean, 1994). Once a curator determines the exhibition's "big idea," they then determine the goals for the exhibitions, and delegate roles to others, often in conjunction with the museum director (Dean, 1994; Hancocks, 1984; Kamien, 2001; Smithsonian, 2002). The next step is to determine the storyline, which builds upon the concept. After this is the design phase which focuses entirely on the aesthetic development of the exhibition, such as color, elevations, lighting, typography, and labels (Bogle, 2013; Klobe, 2012). Each author delves into the process in different levels of detail, but they all follow similar structures, and focus on the time it takes to develop a concept, the aesthetic outcome, as well as the importance of the talent of those working on the project (Bogle 2013; Houtgraaf, 2008; Klobe, 2012).

The traditional curatorial model is a top down process that lauds curatorial expertise, and sees the visitor as a passive receiver of information (Bradburne, 1999). In this setting, the curator holds ultimate creative authority, and determines the intended outcomes of the exhibition. Klobe (2012) goes so far as to say that exhibition teams, while providing an opportunity for a wider range of ideas, can "hinder innovation and efficiency" because they may not work well together (p. 45). In many cases, education staff are not consulted at all during the exhibition development process, and the visitors and community are seen as an outright "burden" on the curatorial process (Hancocks, 1984, p.22). In privileging curatorial authority, the traditional model of exhibition development places primary importance on the internal, personal goals of a curator, and de-emphasizes collaboration, and involvement from non-curatorial staff within the museum.

Contemporary Exhibition Development: Values and Models

As Judy Koke (2013) said in her presentation to Arts Forward, museums need to move into a relationship of being a learning partner with visitors. The traditional curatorial model, with its focus on strict curatorial authority, removes power from the museum visitor, and distances them from the museum as a place in which they feel comfortable and welcome.

In the 1980s, the Boston Children’s museum began to use “experiential learning and open management” in their exhibits, educational programs, and materials, which had the effect of reaching their intended audiences in new and more personally meaningful ways (Spock, 2013). Here was a new way of presenting to the public, one that actively challenged the notions of museum authority and supported entry points for visitors. Michael Spock (2013) said of this shift in practice:

The museum’s staff, board, and numerous communities worked in new and often unorthodox ways to develop experiences and environments where museum users and collaborators—including the staff and board—could learn about themselves and the world in direct, informal, and challenging ways. Through trial and error, The Children’s Museum learned and demonstrated that the museum, despite its inherited collection, was not about something, rather it was for someone—children and families. This paradigm shift led to profound changes in the museum’s organization, and eventually to many other museums around the world. (viii)

In 2012 the Professional Networks Council of the American Alliance of Museums produced the report “Standards for Museum Exhibitions and Indicators of Excellence.” This report was written as a way to characterize standards of museum exhibition development, and to indicate measures of excellence. This is also the basis for annual recognition of going above and beyond standards:

“The Standards for Museum Exhibitions and the Indicators of Excellence also inform the Annual Excellence in Exhibition Competition—a joint project of the following Alliance Professional Networks (PNs): Curators Committee (CurCom), the National Association for Museum Exhibition (NAME), the Committee on Audience Research and Evaluation (CARE), and the Education Committee

(EdCom). The award recognizes outstanding achievement in the exhibition format from all types of museums, zoos, aquariums, botanical gardens, and any other types of noncommercial institutions offering exhibitions to the public” (p.1).

This document unpacks core standards for museums, and is designed to be adaptable to museums of all types and sizes. “Public Trust & Accountability, Mission & Planning, Education & Interpretation” are areas in which a museum as a whole can strive to achieve excellence. Under “Public Trust & Accountability,” an example of excellence includes: “The museum asserts its public service role and places education at the center of that role” (p.1). The standards for exhibition best practices are organized into seven categories: Audience Awareness; Evaluation; Content; Collections; Interpretation/Communication; Design and Production; and Human Comfort, Safety and Accessibility. The intention behind these standards is to give exhibition developers strategies for success because “an exhibition is successful if it is physically, intellectually, and emotionally engaging and accessible to those who experience it”(American Alliance of Museums, 2012). The standards are each defined, and followed by a list of examples by which exhibition developers may compare their work. From there, the document outlines the indicators of excellence in these areas of exhibition development. Specific examples of indicators include “The exhibition includes audience voices in a new or innovative way reflected through exhibition design or content” or “The exhibition offers a new perspective or new insight on a topic.” These characteristics of excellence emphasize the importance of incorporating visitor-centric practices. Practices such as front-end evaluation, interpretive planning, and changing the structure of curatorial authority in the development of exhibitions from start to finish is a core part of the standards, best practices, and indicators of “excellence.” Moreover, the motivation to achieve these standards of excellence is incentivized by award programs (American Alliance of Museums, 2012). The document and its message are codifying the

standard of visitor-centered museums, and making steps towards its professionalizing.

### Interpretive Planning

One of the major changes in thinking and practice in exhibition development is the emphasis on interpretive planning as part of the process. Interpretive planning is the synthesis of exhibition concepts, design, and educational goals for museum exhibitions. It is the act of planning how best to communicate an idea to a wider audience (Colbert, 2017; Ham, 2013). In the traditional curatorial model, an exhibition is developed around a curator's idea and expertise; in an interpretive planning model, an exhibition is developed around a big idea that resonates with museum visitors, an idea that visitors have helped to shape and form.

Museum objects cannot always be so easily understood just by looking at them, or even reading text about them. More than that, the combination of multiple objects to support a thesis is a complicated message whose meaning may be difficult to comprehend or determine (Hooper-Greenhill, 2000), especially if we consider that every visitor makes their own meaning from their own unique context (Hooper-Greenhill, 2000). Perry describes an interaction between a father and son in an exhibition. This father and son approached the exhibition *Colored Shadows*; the father became excited to share his personal knowledge and connection with the exhibit to his son. The son was briefly engaged in the interactive, waving his hands over the colorful lights to manipulate them, but became disinterested, and then bored with his father's explanations of the content. Perry posits that there could have had a more engaging and fulfilling outcome had there been sufficient interpretive materials provided, particularly ones that encouraged visitors to learn together, and teach each other (Perry, 2012). This anecdote, and the overarching purpose of the article, expresses the importance of meeting the visitor where they are conceptually by finding a starting point (which is done by conducting front-end research prior to developing an exhibition)

and creating ways for visitors to facilitate their own enhanced experiences, and make their own meaning (Perry, 2012).

Colbert (2017) explains that the process of creating an interpretive plan includes multiple considerations:

“...recommendations on the museum’s or subject’s theme, subthemes, and organization; outcomes and indicators of success; interpretive media’s content, tone, and sometimes final text; aesthetics and graphic elements; and education and evaluation recommendation” (p.1-2).

The interpretive planner’s goal is to provide a holistic exhibition experience for the visitor. When visitor needs are accounted for in the development process, exhibitions can create deeper personal connections and learning experiences. One example of these considerations in practice is label writing. Rand (2016) argues that thinking about the way an exhibition label is written and edited allows for greater access to content. The more information that visitors need to digest, the less likely they are going to feel able to read and absorb that information - they spend less time in the space and do not get as much out of their experience. The opposite then is true, that shorter, compelling and personally engaging labels will draw more visitors to read and pay attention to an exhibition.

### Teams and Collaboration

Another way in which exhibition development processes are evolving in museums is in their shift towards a more collaborative, team-based dynamic. Exhibition teams are comprised of museum staff members that fulfill different roles of the development process. These roles include the client, usually a director; a content specialist or curator; a designer; and a content interpreter, a role that “is predicated on the notion that a scholar’s view is usually not the same as the visitors view” (Smithsonian, 2012, P.16) indicating that the visitor experience is important to this process.

Kamien (2001) describes three collaborative models she personally experienced over the course of her career in exhibition development. The developer model, which she credits to Michael Spock, former Director of the Boston Children's Museum, places central authority with the content interpreter, supported by specialists in a variety of fields. These specialists could include evaluators, designers, curators, and outside advisors. The Broker model, created by Elaine Heumann Gurian, is a model that gives creative equality to a designer and developer, and places a project manager or "broker" to be the intermediary to the client, the director. The team model, as described by Kamien, consists of a team of designated roles: the content specialist, designer, and educator who share authority and responsibility. It has become increasingly common to find the team model in institutions (Bridal, 2013). Some museums expand this team to include marketing, development, and membership.

Research on collaborative decision-making suggests that a group of people with differing backgrounds and knowledge on a variety of topics will aggregate information to make the most "correct" decisions together (Owen, 2015). Teams and collaborative groups force people to understand each other, to disagree, and to make strong, holistic decisions that, by their collaborative nature, consider all variables and stakeholders (Blandy & Congdon, 2003; Bridal, 2013; McKenna-Cress & Kamien, 2013). Teams and collaborative environments that exhibit strong communication and collaborative decision-making on every level are more likely to develop effective exhibitions due to an emphasis on their shared values, goals, and cohesion (Bridal, 2013; Griffin & Abraham, 2000).

At the same time, however, conflict will arise when dealing with other people. As mentioned earlier, Klobe (2012) takes issue with teams:

"Nevertheless, depending on the makeup of the team and its ability to work together, the team process can hinder innovation and efficiency. The team approach demands a

democratic interaction where all members of the team feel free to advocate for their areas of concern without fear of alienating others” (p.45).

Communication, power struggles, personal goals, discordance amongst team members, all of these factors, and more, can contribute to a dysfunctional team.

Exhibition design consultants articulate the frictions that come with exhibition development in particular, but hint at what are common dysfunctions and challenges faced by teams universally (Chiodo, 2010). Lencioni (2002) explains that teamwork is not easy to attain, but that the natural pitfalls people face when working on teams or collaborating can be resolved. In order to show how teams can become dysfunctional, Lencioni developed a model of these dysfunctions and shows how each issue is cumulative and dependent upon a root issue. The issues begin with an absence of trust, in which team members are unwilling to be vulnerable and open with each other. Failing to develop a basis of trust then supports a fear of conflict, because teams are incapable of engaging in frank conversations about their ideas for fear that they will create conflict. Instead, individuals avoid expressing their true views, and are more guarded in their communication. Third, due to a lack of healthy conflict, team members begin to lose interest in the project, and lack commitment. They cannot feel committed because they do not feel support for the project. Due to the lack of commitment to a project, members of a team may then avoid accountability for the failure. Finally, the failure to hold others accountable creates an environment where individuals on teams are no longer working towards a shared goal, and are inattentive to results. Their focus is no longer with the success of their team, but on actions that support their needs such as ego, recognition, or career development.

While the research on team dynamics both within and outside the museum context is plentiful, there is a clear gap in practitioner perspectives. The resources available are largely

from the perspective of contract workers and leaders, and based in opinion and personal observations.

### Co-Creation, Open Authority, and the Participatory Museum

Beyond working in teams to develop exhibitions, some museums have moved to models that are even more experimental and radical, models that are largely about the democratization of arts and culture, and the sharing of authority and agency: co-creation, open authority, and participatory models. Community co-creation and “radical collaboration” are different ways of getting new and different perspectives beyond those of the institution. Co-creation is the practice of bringing community voices to the museum to share in the curation of an exhibition and to have creative control over what the museum is presenting (“Shifting Paradigms: The Case for Co-Creation and New Discourses of Participation | the Inluseum,” n.d.). This is especially valuable as a method of exhibition development when it comes to issues-based exhibitions.

One recent example featured in the National Association for Museum Exhibition’s (NAME) *Exhibition* publication details how North Carolina’s Levine Museum of the New South collaborated with the Atlanta History Center, and Birmingham Civil Rights Institute, an effort they dubbed “radical collaboration.” Their exhibition concept was inspired by a multiyear listening session called the *Latino New South Project*, which focused on understanding changing demographics in the south and its impact on Latinx communities. To develop this exhibition, these museums emphasized the community participants’ role as facilitators, and the need to build and share trust across all stakeholders. They functioned on a flat hierarchy, established their shared vision of success, and facilitated an environment in which candor was paramount to trust and success (Fohrman & Bryant, 2017). Research in curatorial practices would consider methods

like this, ones that foster co-operation, joint creativity, and learning from each other, participatory design (Blandy & Congdon, 2003; Lee, 2007; Steen, 2013).

In the field of design, there is an area of thinking called participatory design. This design concept is predicated on user-centered experiences and cross-context collaboration. Participatory design, or PD, originated in Scandinavia in the 1970s as an information design system with the aim to empower users in the development of the tools they use (Kensing & Blomberg, 1998; Steen, 2013). As the concept matured it began to stagnate, and many designers called what they did participatory simply because it was using “participation” as a tool. Iverson, Halskov and Leong (2012) posit that it is the intention to be equitable and holistic that makes a participatory process. The inherent value present in participatory design is the democratic process. User experience developers explain their reasons for using such practices thusly,

“A participatory design session is a great opportunity for designers and researchers to meet and identify with the end-user. The user is invited to enter the creative process and by listening to them, we can avoid making mistakes we are often tempted to make as a result of designing for ourselves instead of designing for the user” (“Participatory Design,” 2015).

Values-led participatory design is grounded in understanding communities and the everyday lives of people. By viewing every participant in a PD project as an expert in what they do, as a stakeholder whose voice needs to be heard, one can “shape and reshape... a civic landscape that is informed and inhabited by deep democracy” (Hester & Lawson, 2017). It is a process of transactions through disagreements, and conversations that lead to shared understanding and language – something that is seen in museum teams that exercise effective collaborative decision-making and co-creation (Hester & Lawson, 2017; Lee, 2007).

The Santa Cruz Museum of Art and History, under the direction of Nina Simon, follows a process of participatory design. In her book, *The Participatory Museum*, Simon (2012)

emphasizes three fundamental concepts that link her work to participatory design theory. First, the belief that the visitor is core to the museum; second the understanding that free choice learning and individual meaning making is key to visitor experiences; and finally that the “user’s voice can inform and invigorate” (p. ii). For Simon, participatory design in museums means dedication to providing the platform for visitors to connect with content and each other through the creation of content.

Museums that use participatory and co-creation models of exhibition development are most like this field of design thinking. Given that, these methods mean more engaging and relevant museums. Given the experimental nature of these exhibition development processes, there is warrant to explore and describe new and different ways to exhibitions that are utilizing more democratic or participatory methods.

### Summary

Historically, art museums have used a single-curator led exhibition development model that privileges curatorial authority over all else. More recently, new models are emerging, ones that are more collaborative, ones that are more participatory, and ones that emphasize the importance of interpretive planning within the exhibition development process. The literature and research available on museum exhibition development, teams, and museological values over time is plentiful, but without practitioner perspectives on these models, we cannot know the full story.

### Chapter 3: Methods

The purpose of the study was to describe new and different exhibition development models in art museums. Three research questions drove this study:

1. What are the characteristics of these new models that make them different from a more traditional, curatorial-driven exhibition development model?
2. What are the perceived benefits of these new models of exhibition development?
3. What are the challenges of implementing new exhibition development models, and what are the strategies used to mitigate these challenges?

This study utilized a case study design (Yin, 2014), and data were collected through semi-structured focus groups with museum professionals in museums that are using new or different models of exhibition development. This study also collected data using document analysis to look at exhibition development documents, interpretive plans, logic models, strategic plans, process descriptions, and flow charts. This chapter describes the sampling, data collection, and analysis procedures, as well as the methodological limitations of the study.

#### Sampling

This study used purposive sampling to identify 4 case study sites. Sites were selected based on expert informants in the field, who identified sites that are known for their exhibition development practices. Art museums with exhibition development processes that placed visitors and learning at the core of their processes were considered. In total, ten art museums were identified as fitting these criteria; the researcher contacted six, and four museums agreed to participate in the study.

Museum 1 is a midsize museum in the Bay Area of California. It is an art and history museum with a regional collection focus. This museum's exhibitions and programmatic focus is

regional in nature as well, with an emphasis on community engagement. Exhibitions that they have displayed in the past include an exhibition developed with a local artist that creates prints of California's coast using a woodcut technique.

Museum 2 is a large art museum in the state of Missouri. Their collection contains art from around the world, and exhibition content is centered in the cultural context of that art. Exhibitions are developed both in house and loaned from other institutions. Some examples of exhibition content include an exhibit on the importance of Chinese Jade art, burial practices, and the connections that visitors can make between their own culture and that of the Chinese Han Dynasty.

Museum 3 is a mid to large art museum in Oklahoma located in a historic house. They are a collecting institution with art ranging from historical to contemporary pieces. Their exhibitions range in nature from temporary installations by contemporary artists to collections-based exhibits with an intent to encourage connections between the art and wider issues such as indigenous art and decolonization, or military propaganda during World War I.

Museum 4 is a large art museum in Minnesota, with a wide-ranging fine arts collection with art from around the world and as old as 40,000 years. This museum's exhibitions focuses range from modern artist retrospectives, to stylistic and historical surveys, to personal stories shared through visual art.

At each institution, the researcher identified the director or head of the curatorial or interpretation department, and subsequently asked department heads to identify all staff involved in the development of exhibitions. Job titles of these relevant department staff and their leaders varied across institutions and included Interpretive Directors, Education directors, Curators, Exhibition Developers, Exhibition Managers, and Community Outreach Directors.

### Data Collection

Data were collected through document analysis and semi-structured focus groups. Documents included exhibition proposal forms, process descriptions, theory of change documents, flow charts, strategic plans, interpretive plans, and one custom document titled an “Experience Document” which was a hybrid of an interpretive plan and an exhibition proposal. The researcher scheduled, with consenting professionals (see Appendix A), over-the-phone semi-structured focus groups. The questions (see Appendix C) were intended to delve further into practitioners’ perspectives on exhibition development, and the benefits and challenges. The researcher tried to obtain multiple interviews from each participating site.

A total of four focus groups were conducted via telephone with museum professionals across four sites. Each focus group lasted between 40 and 60 minutes. In order to obtain the perspective of a collaborative team, the researcher tried to interview a minimum of two to three individuals per site. Only one site provided just one staff member to interview.

### Data Analysis

Audio recordings of focus groups were transcribed, and those transcripts were analyzed within each site, and then across each other (Yin, 2014). This was done to understand first what the characteristics of each institution’s models were and their personal perspectives on their own models, and then to identify where thinking and practices converged and diverged across different institutions. The researcher then incorporated data from the document analysis from documents that were provided. The researcher identified themes through emergent coding under each research questions.

### Limitations

As a result of using purposive sampling methods to choose research sites, the researcher was limited to museums that were well known for their models. Meaning, the museums selected are potentially model scenarios, and there may be museums that are using similar models and have divergent perspectives and experiences. Without a wider data set of museums, results can appear skewed. As well, there may be many more art museums beginning to experiment with models that are beyond what is known to the museum industry.

A second limitation was the sample sizes, as one site was only able to provide one staff member to interview, and at two sites interviewees needed to leave at intermittent stages of the focus groups due to prior engagements. As a result of these changes and absences, staff would not be able to corroborate or elaborate at the museums with only one participant.

## Chapter 4: Results and Discussion

The following chapter summarizes the results of this research study, organized by research question, followed by themes and sub-themes that arose from data analysis.

### **RQ1. What are the characteristics of new exhibition development models that make them different from the traditional, curatorial model?**

Three themes characterized the new exhibition development models studied here: 1) they are collaborative; 2) they have a well-defined process; and 3) they are outcomes-oriented.

#### Collaborative

All four case study museums described their process as collaborative, employing core teams with cross-functional roles to work on exhibitions from start to finish. The collaborative nature of the process started with the sites' rationale for adopting a new model of exhibition development. All four museums said their goal was to implement a more democratic way of working, one that brings new and different perspectives to the table. For example, participants at Museum 2 explained that they began making a transition to their model when a new Director came on and emphasized the importance of collaboration and teamwork. Participants at Museums 1, 2, and 3 directly and indirectly addressed the need to take a more visitor-centered approach as a strong reason for making this strategic switch. Three museums expressed the need to obtain a broader perspective and expertise when developing content and goals. One site in particular has only recently begun experimenting and developing their new model for exhibition development. When discussing the problems this model was trying to solve, Museum 3 explained,

“I think education [staff] in the past were having to react...I think it wasn't making sense for us and we were saying you need to be more interpretive from the get go, so

that we all have these shared voices and ideas together, not just sort of one lone educator scrambling to try and incorporate the concepts of a curator.”

A respondent at Museum 1 stated that they made the switch in order to better collaborate with new and different members of their community, and since then have spent several years honing their process to be sustainable and effective:

“I think the more we were trying to collaborate with different kinds of community members that were not just artists but people in non-profit or people from social justice organizations, the more we were seeing that that requires a lot of time and honest communication and that it requires a different kind of structure.”

All museums responded in some form that they made this transition to be able to share cross-departmental knowledge more easily, and cultivate a shared sense of responsibility and investment in their museum’s exhibitions.

Collaboration was seen not just in the rationale for a new way of developing exhibitions, but also in the team structure designed to move the process forward. In Museums 1 and 2, a core team was a permanent part of the initial planning process. Once exhibition development has been approved by the director to move forward, other museum staff joins and leaves this core team. In Museums 3 and 4, teams are strategically created after an initial exhibition idea has made it into the exhibition schedule. Other members of staff are brought onto the team, as projects get closer to completion, similar to Museums 1 and 2. Museum 1 described its team as a core group, made up of the Community Engagement Coordinator who has a cross-functional role in exhibitions, education and public outreach; an Exhibition Developer with a largely curatorial role; an Exhibition Designer; and a Graphic Designer. The core team has weekly meetings:

“We’re all working together on a topic. Then we have the exhibit schedule through Trello so we keep track of deadlines and tasks [that each is responsible for].” Museum 1 explained that all staff are involved in monthly meetings in which there are

“...opportunities where other staff members are involved in the decision making and the collaborative process. That includes decisions like who else in the community should be invited to participate in the exhibition... There’s a couple of core folks on our team who we always invite, folks from the school programs department where it’s important to be able to run these ideas by them to make sure that kids can understand and are going to be excited and be able to stay in the activities.”

They also stated that these meetings include “brainstorming what kinds of activities should we do to really activate the exhibit or allow for ways of learning. Those are collaborative brainstorms where all of the staff are excited.” All staff contributed to brainstorming, as well as making decisions on exhibition elements (i.e.: public programming, education, marketing, membership) that are core to their individual roles and expertise.

Participants at Museum 2 described their team as a core group that consists of an Interpretive Planner, a Curator, and an Exhibition Designer: “The three-legged stool upon which we throw all the other parts. They’re responsible for really developing the initial framework that then the team as it gets bigger fleshes out.” This museum also uses a senior leadership team, composed of the Director of Curatorial Affairs, the Director of Education and Interpretive Programs, the Director of Presentation and Experience, and the Chief Information Officer. This group acts as a committee that reviews exhibition documents and proposals to make sure that the exhibitions being developed are aligned with and relevant to the larger institutional goals.

Museums 3 and 4, however, first determine the exhibition topic in the Curatorial Department, and then build a team for the project. Museum 3 said their exhibition development teams are strategically identified once the director has approved an exhibition for development. Similarly, Museum 4 has one staff member who organizes a core team for each exhibition, which includes a Curator, the Director (as their schedule allows), Education staff, Visitor Experience staff, and others as needed:

“We’re all helping to make these decisions together so that it isn’t everybody making decisions on their own and then trying to commit...to have everybody in the same room with kind of everybody’s agendas to be put on the table at is really helpful.”

Staff at case study museums talked about the importance of encouraging participation from non-curatorial staff in the generation of ideas for exhibitions. Case study museums varied in terms of staff involvement in this process. All participants explained that their processes began with ideas that came from their curatorial departments and were then approved for development by their directors. Museum 2 said of the exhibition proposals, “Our process is fairly simple in that curators or directors or anybody who has an idea for an exhibition goes through the director of curatorial affairs and then the director decides whether or not it is going to be pursued or whether or not it needs to be more fully fleshed out.” The process by which “anybody” could propose an exhibition was not explicitly mentioned.

Museums 2 and 3 stated that senior leaders from all different departments review exhibition proposals, to provide multiple perspectives beyond those from a curator alone. A participant at Museum 3 stated of bringing non-curatorial staff into the very beginning of the development process: “The idea [behind] that larger body is to have people sort of editing the curators right from the beginning.” This study participant also mentioned, “I think the goal is for other people to potentially put ideas...to put an exhibition or proposal on paper.”

Museums 1 and 4 also develop ideas in an exhibitions or curatorial department, and then seek approval from their respective directors. Museum 1 does not have curators, but an exhibition developer who works alongside the director of community engagement to develop ideas for exhibitions, which are then approved by the director. Museum 1 said of moving forward with non-curatorial staff that they use a Slack channel for exhibitions where “the core team can say things about the exhibition, but all staff can push ideas [forward] or they can give

feedback on exhibit content documents or things like that.” They also, as stated above, hold monthly meetings for decision-making and collaboration.

Museums 1 and 4 described using participatory design principles within their exhibition development processes to move beyond collaboration with internal staff to include the community. Staff at both of these case study museums described ways in which they engage local communities and invite them to contribute to exhibition development. They described practices that use participatory design principles, which are identified as such because they explicitly seek the participation and collaboration of their community in order to create these exhibitions. Specifically, Museum 4 participants explained how they experimented with both scholarly, and community “round-table” meetings, which informed what they included in the exhibition checklist. They stated, “We’re inviting local practitioners of [exhibit content]...and others to talk about what they would expect, for example, from an exhibition of [Topic], particularly as it related to the local [topical] community, which they know better than we ever could.” Museum 4 also posed questions to museum visitors on Facebook to invite them to share perspectives on the space, which they then shared in the gallery and online. Museum 1 has a dedicated space for community and local issues-driven exhibitions:

“Issue driven exhibitions are rooted in an issue that is really relevant to [museum location], working with the group that is most affected by that issue, policy makers, and advocates connected to that issue. Together we, collaboratively with that group, establish what are the goals for the exhibition and then the work is designed to really address those goals.”

### Well-Defined process

A second theme that emerged was that three of the four case study museums have a written, well-defined process for exhibition development, with specific roles, tasks, and strategies that are sustainable across different types of exhibitions.

Museum 1 uses project management and communication tools such as Slack (a project management and communication tool) and Trello (Organizational tool) to document the roles and tasks required to complete a project. The core team has weekly meetings, all staff are included monthly to check in “what kind of activities should we do to complement this exhibition, or are there any partners that we should invite to be part of this exhibition that we haven’t thought of yet.” This museum has an exhibition development guide which acts as both an interpretive plan that guides overall experience goals, and learning outcomes. It guides staff on specific tasks, exhibition content requirements, and intended audiences.

Museum 2 has multiple tools in use to organize their exhibition development process. They use an info-graphic flow chart, which divides the full exhibition development process into five phases. The first phase, “Intro,” is the introduction of ideas, and a list of places from which they can come. Once ideas are prepared, the team must complete an experience document. The experience document is an in-house developed alternative to the traditional exhibition proposal form. They developed the experience document so that multiple departments within the museum had to write a section that was relevant to their department.

After they complete an experience document they move on to the next phase, “Goals.” In this phase, exhibition ideas are filtered through the director and the senior leadership group, composed of the directors of several departments. Once filtered, the project core team identifies, sets, manages, and distributes goals in preparation for the next phase. Museum 2 includes two

periods, 30% and 70%, in which they report progress levels to a senior leadership group who act as a committee to provide feedback. The 30% mark is the “Ideate” phase in which the project is communicated with leadership, and evolves. This is also the phase in which the larger team becomes active. At this point the core team can do one of two things. The team can update the senior leadership group, and move forward with their experience document to the next phase, or they can just report their progress up to that point.

The next phase, “Implement,” is when they begin implementation and project tracking. Again, one of two things occurs. As this is the 70% mark in the exhibition development process, the core team reports their progress to their leadership group, or they present their progress to all staff at an annual meeting. They begin to bring on non-curatorial departments to the main team, and develop, refine, and execute the exhibition. The final phase, called “Measure,” is a post-completion phase in which the museum completes an internal assessment with all members of team, and visitor services. Participants described it as an “internal kind of post mortem” to determine what is and is not working.

Museum 3 just started their new exhibition development process, but makes adjustments as needed to their process. As it stands now, this museum develops exhibitions with staff from all areas early in the process in a similar manner to Museum 2, in that a team of senior leaders from all departments starts at the beginning by reviewing exhibition proposals. Once a team is determined, meeting occurs on a regular basis, and increase in frequency as an exhibition gets closer. This broader team meets monthly with the core exhibition team; they explore and expand upon ideas, and unpack the intended outcomes. After implementation, Museum 3, similarly to Museum 2, gets the preliminary feedback of visitors from front line staff, and responds to those immediately.

Divergently, Museum 4 does not have as well-defined a process, but their exhibition development model is experimental, and still largely dependent upon curators. This museum's development process draws largely on traditional curatorial roles, though they practice collaboration in controlled circumstances. These practices are unwritten and interpreted by a given curator; some curators will invite the interpretive planner to assist right from the beginning, others will not. One participant stated, "I don't think we have anything on paper right now that's basically like 'Here are all the stages'" This participant also said, "So if we had a document to point to then it's harder for people to wiggle out of..."

### Outcome-Oriented

Staff at each site expressed the importance of being outcome-oriented in their exhibition development process. While this looked different across sites, three of the four case study museums use logic models, interpretive plans, and/or visitor experience goals as a core part of their development process.

Museum 1 follows a strict protocol for developing exhibitions in an outcome-oriented way. This case study museum uses a theory of change. Their theory of change is a guiding document for all work done at the institution, not just in specific exhibits. It defines the activities that they do, specifically creating a "welcoming gathering place" or finding, inspiring, preserving, and sharing stories and ideas. The theory of change includes the outcomes these activities affect. Of these intended outcomes, staff at Museum 1 stated, "We see three different ways to really activate that [our goals] with participants through bonding, through bridging, and through empowerment." "Bonding" means that visitors will share experiences that make them feel connected to friends, family and community. "Bridging" means that visitors will explore

content in order to build bridges across differences, they may make “unexpected connections” or “build awareness and respect for diverse cultures and people” under this outcome category.

Lastly, “Empowerment” means that visitors will be empowered to share their creative and civic voices through feeling involved and included, making personal connections, and feeling inspired to “go deeper” into their learning and experience. Finally, the theory of change expresses the impact the museum seeks to create. Staff at this museum articulated that their overall intended impact is that their community “grows stronger and more connected.” This guiding document establishes that the museum is driven by overarching outcomes because everything they develop, including each exhibition, has to adhere to this theory of change.

The exhibition strategy itself follows the theory of change in that it has developed specific intended audiences, visitor experiences, and learning goals for each of their galleries. The exhibition plan connects the theory of change to each exhibition through examples such as: “Exhibitions support Bonding when they: make it easy for multiple people to read a label, do an activity, and move through the gallery together.” Each gallery has an individual mission that aligns with each outcome stated in the institution’s theory of change. An example of such a mission is their Art Forum Gallery which is devoted to “Emotional experiences: Sharing powerful stories that ignite emotional connections.” This mission directly relates back to the outcomes of “Bridging” and “Empowerment” as described above. They also developed options for each type of exhibitions that fits within that mission, and included measurable requirements and goals for each of those exhibition types. The requirements that the exhibition strategy outlines are indicative of the museum actively using their intended outcomes as a method of developing exhibitions, and not relying upon a traditional curatorial voice. They explained, “It’s

important for us to articulate that [outcomes] in the planning process to know what exactly we're trying to push or achieve with each particular exhibition.”

Case study Museums 2, 3 and 4 follow interpretive plans with articulated audiences, learning goals and visitor experiences. The interpretive plans at Museums 2 and 3 are documents that synthesize important information for each individual exhibition. It includes the big idea or enduring statement of the exhibition. The interpretive plan identifies visitor outcomes, sometimes in a charted format that cross-references all interpretive materials in an exhibition with the outcomes listed. Museum 2 develops an interpretive plan during the “Ideate” phase of their development process. Their plan includes the “Big Idea,” which acts as a thesis or purpose statement for the exhibition, and guides the creation of learning goals which are either knowledge outcomes, the big planning sheet that articulates experience and learning goals for visitors.

Museum 2 utilizes the experience document outlined in the last section, and interpretive plans to focus the exhibition development process on outcomes. They created the experience document as a way to replace lengthy exhibition proposals that gave long explanations with a strictly curatorial focus. The experience document was developed as “part of the democratization of the team effort.” Another participant at this site built on this, saying that the experience document is the “connection to our strategic plan. So, we have fixed, overarching strategic goals. The core team ticks off as many of as they can.” Once all relevant departments fill out the experience document, the core exhibition team begins to draft an interpretive plan:

“Then we use the interpretive plan as sort of a guiding document throughout the process as a way to... there's so many things you can say about art and there are so many interactives or activities you can have in an exhibition but we don't have room for all that so it's sort of a way for us to hold ourselves in check sometimes. Our ideas get a little too out there, and then we look at the interpretive plan and we say, ‘Oh

this really isn't meeting what we are signing up to do.' It's sort of a way for us to be like, 'Okay, this is not the project for that' and move forward in a different way."

Similarly, Museum 3's interpretive planning documents include a sheet called the "big idea planning sheet." It breaks down knowledge, emotional, attitudinal, behavioral, and organizational outcomes of the exhibition topic. Examples of outcomes from Museum 3's last exhibition include: "Visitors will learn about some of the criteria used by museum professionals to decide whether to acquire and display works of art and collections." Another example: "Visitors will feel that museums are places for them, where they can participate in activities and where their perspectives are valued." Outcomes are framed as impact statements that are specific, measurable, achievable and relevant outcomes to the exhibition content, and overarching institutional goals.

Museum 4 articulates experience and learning goals for each of their exhibitions (though this researcher was unable to obtain a copy of an individual exhibit plan). This museum uses an interpretive plan for their entire museum, not per exhibition. This means that this plan is the overarching guiding document for all interpretive content in the museum. It includes definitions and reference research to support their recommendations. It also includes instructions for how to write interpretive text, and how to connect content, labels, and objects with interpretive outcomes. An example of an instruction that is outcome-oriented can be seen in the instructions given for writing effective interpretive text: "Don't tell visitors what to think. We want visitors to grow comfortable and confident in their ability to appreciate and make meaning of what they see. Artworks can support numerous interpretations." And later it states, "When appropriate, we must avoid implying or overtly stating that there is a single meaning for an artwork or its components. Even if we know what the artist's intent was/is, that interpretation stands alongside the

understandings and meanings made by visitors.” The interpretive plan also includes instructions and the strategic plan of the museum:

“As part of our 2021 strategic plan, we seek to bring diverse voices and viewpoints to our galleries. This will work better in some formats than others, and it will take time to do this in an authentic and thoughtful way. By making use of the diversity of voices inside and outside the museum, we acknowledge the complexity of the interpretive process. Audiences should become aware that there is no one authoritative interpretation on most issues and will be encouraged to engage in interpretation themselves.”

One participant at this site explained that they have been making moves to develop the experience outcomes earlier in the development process than they normally do. This participant stated that they believe “working with [the curator] this far in advance, we’re going to be able to...put together, ‘This is what we hope for the visitor’s experience’ and have that guide the process. So sometimes... it comes after the fact. Ideally it would come before.”

When asked how sites use evaluation and visitor research in the development process, staff at all sites responded that they conduct evaluation, to varying extents and in different capacities, for the purpose of gathering visitor input to exhibition content but also to establish whether their exhibitions are in fact meeting their intended outcomes. Museums 2, 3, and 4 conduct regular formative and summative evaluation with large-scale exhibitions, another way in which their process is outcomes-focused. Museum 3 explained that they do not have any staff in a full-time evaluator capacity, and are trying to learn “how to accomplish evaluation and visitor research on the limited resources that we have at the moment.” They offset this with small-scale evaluation and prototyping to understand audience motivations and perspectives, which they use to develop interpretive plans and outcomes. Divergently, Museum 1 does a large-scale audience

survey every 2 years and, as stated elsewhere, prototypes every interpretive element with visitors to make sure it is relevant and fulfills the related intended outcomes.

Museums 1 and 4 gave examples of how they conducted focus groups with community members. Museum 4 had a “round table” conversation on content regarding the enslavement of African American people. Museum 1 invited foster youth to share their stories and “really set a goal for visitors to be able to take action in the exhibition, and know how to do so.” The responses and data gathered through these meetings allowed for the museums to pursue content that they would not have considered without evaluation and community participation to determine intended outcomes. These practices are outcomes-oriented because they force staff to look at what the end-user will experience, and forces exhibit content to be predicated upon the intended outcome established by participants.

### **RQ2. What are the perceived benefits of these new models of exhibition development?**

This research question sought to understand how case study museum staff perceived the benefits of their new exhibition development processes for themselves and for the institution. Across all four case study sites, three core themes emerged: 1) Personal investment or buy-in; 2) Visitor centeredness; 3) Clarity of Purpose.

#### **Personal investment or buy-in**

Study participants at all four participating museums felt that the changes made to exhibition development in their institution had affected the staff of the museum as a whole. For example, participants at Museum 3 stated that when they initiated their new exhibition development process, they noticed that there was an “emotional and professional buy-in” to the project at hand. Museum 3 participants stated that including staff right from the beginning made

them feel “knowledgeable,” and that because staff felt validated in their expertise, they were motivated to do their best work.

Study participants at Museum 2 explained how in developing interpretation in a collaborative manner, curators’ attitudes towards other staff changed: “Now I say that there’s mutual respect, there’s really good listening. Not that there aren’t conflicts, but they really work through them.” Similarly, at Museums 1 and 4, when staff felt like their expertise was valued, they felt good about contributing. A participant at museum 1 expressed that they felt “...It does give a voice to many of the others... a sense of inclusion to many of the other departments and divisions.”

Professional development and learning together was another way in which staff at these museums felt they benefitted from their new exhibition development model, mainly due to its collaborative nature. Study participants in all four case study museums saw the new process as a way to better themselves professionally, and learn with others in a collaborative culture. One participant characterized the benefits of collaboration: “We end up with a product that ends up with the completion of something that we’re all very engaged with and proud of and have learned something from. We all work in a learning institution and we are all learning all the time.” Staff at Museum 3 saw their collaborative development processes as beneficial to professional development as well because, as they explained,

“So, we think about a combination of background and experience for each individual person and team dynamics. Professional development [is] an important consideration... We have a new designer on staff who hasn’t worked on any exhibition previously, so we have a buddy from the communications department there to work with her. So she’s not just totally on her own. She can get a little bit more guidance and learn the ropes. She’ll be ready to go solo on a team in the future. So that’s a case where I think professional development was a big consideration for her.”

Participants from all four museums expressed feelings of pride in their work, and a sense that their work is better because of the collaboration that happens during the exhibition development process. They stated that others across the institution shared similar sentiments, and feel a deep sense of ownership and responsibility for projects. A curator at Museum 2 explained,

“I’m in this field because I love this art, I love the culture that produces it. It means so much to me and these approaches, these new technologies, make it mean something to somebody else where it wouldn’t have otherwise. I’m all for it. I think we should do it.”

Participants at Museum 3 shared a similar sentiment that when many voices are included, it cultivates a sense of investment, ownership, and pride: “When you’re included in that exhibition development process from the beginning, it makes it so much easier to internalize what the exhibition is about so you can champion it.” This is something that, since this museum is new to their exhibition development mode, they are seeing with more frequency as they progress.

Another interesting trend related to the benefits of new exhibition development processes was that participants at each institution perceived their museum was “avant-garde” or “progressive” in their exhibition development models as compared to other art museums. Participants at Museums 1 and 2 indicated this perception is a point of pride for them. Similarly, a participant at Museum 4 pointed out that they feel a sense of pride that their development model is progressive compared to other institution:

“Going to conferences where there are other exhibition administrators and planners, you hear about their team models. I think ours is on a more progressive side, and I like to think that it does give a voice to many of the others... a sense of inclusion to many of the other departments and divisions.”

A participant from Museum 3 explained feelings of pushing the envelope:

“We feel like we’re sort of on the forefront. Everything you read, everybody’s doing this right now, so you better know how avant-garde this is now. It’s definitely not the old way of doing things. So, I think we’re among a handful of people who are doing this. There was that article on Crystal Bridges too recently about what they’re doing.

But I think it made us feel a sense of pride that we're pushing and creating and that we're learning.”

### Visitor-Centered

Participants at Museums 2 and 3 believed that because of changes to their exhibition development process, visitor experiences with their exhibitions were more positive and more fully inclusive of the visitors’ motivations and interests. Participants characterized visitor-centered benefits from personal perspectives. For example, staff at Museum 2 said that they believed the changes in exhibition development at their institution have had an impact on their visitors’ experiences. In fact, they believed that their attendance has risen because of the changes:

“It's about coming together and remembering what we all get to do here. What we're passionate about is connecting our community with art and we feel like the exhibitions we produce from this [the new process] are better engaging our audiences and are helping them to learn. It's hard to put into words because it's nice to be able to throw out statistics or some numbers. I think it is about more than just having increased attendance or more than just having a high number. It's your participation. It's also about making an impact in your community in a deeper more beneficial way than numbers can really describe.”

Moreover, participants at Museum 3 felt “like it [new development model] forced us out of an old mold,” explaining that curators get stuck in their ways, but the inclusion of multiple perspectives via teams, and a focus on interpretive development, has helped expand knowledge (in this instance the curator’s knowledge), and has in their view been more “welcoming” to the visitor.

### Clarity of Purpose

Having an exhibition development process that allows all staff across an institution to be working towards a clear and shared purpose was a key theme that arose when participants were

questioned about the perceived benefits of new and different exhibition development models in their museums. Participants all said in one form or another that they felt the collaborative model of exhibition development allowed for them to feel clarity in their purpose, and that they were all working towards the same goals together. A respondent at Museum 1 said of the importance of organizational alignment,

“I think that it's really important for everybody to be on the same page in terms of why we choose different types of exhibitions, and what they're trying to achieve. When a visitor walks into the space, they have different ways of learning in each exhibition. So, the strategy really allows us to have clarity in what we're doing and why. And it just helps us clearly articulate the goals, not just the exhibition staff, but with the partners that we work with and other staff at the museum.”

Museum 3 commented that they are thankful for the clear expectations and understanding of roles, and that organizational alignment “forces us to work a little but more in tandem with our colleagues versus saying ‘Hey, I need this last minute and we’re late, and can you get that up, and why isn’t this already dadadadada, and this is more important than the fundraiser you’re doing next week.’” One participant at Museum 4 mentioned that they believed being on the same page allowed everyone to be ready to participate and contribute in their team meetings.

Participants at Museum 2 felt that the shared purpose that came from their new exhibition development process fostered communication and innovation across the organization, as well as with partners and visitors outside of the institution. This feeling was evident in Museum 2’s observation that clarity of purpose has helped teams to see “why are we doing this, what do we hope to get out of it...what’s the big ideas and reasons.” Museum 2 also delved into and the importance of shared purpose and alignment in meeting their goals, equating the museum to a human body: “If you think if you think of it like an [the] institution like a body you can’t have one organ that refuses to work together or it’s gonna be sick...” To which someone replied

“Well, maybe the appendix!” The point was that they have found their shared purpose across the institution, and have created a culture in which this shared purpose is a signal of success.

**RQ3. What are the challenges of implementing new development models, and the strategies used to mitigate them?**

Participants talked about the various challenges of implementing new development models, and the ways in which they have met those challenges. The three main challenges centered around team dynamics (Lencioni, 2002): 1) the extra time required to collaboratively develop an exhibition; 2) the personal comfort and trust necessary to work collaboratively; and 3) communication breakdowns.

Time

Participants at most sites said in some form that one of the biggest challenges that they face is that exhibitions developed in a collaborative manner take more time to create. Museums 1, 2, and 3 described the process of collaboration as slow, and requiring more meetings, emails, and general communication. In the words of a participant from Museum 3, communication is crucial to keeping all involved parties on the same page, “especially when it’s not the default mode of working, and I think that’s true for most staff here.” This museum, given their recent change to a collaborative method of exhibition development, found time especially challenging due to staff being unfamiliar with large scale collaboration, and the time commitments that surround the process of bringing many people together, and then coming to an agreement. Museum 3 hoped to add a member of staff to play the role of project manager, who will hold that impartial role and manage the time commitments and communication strategies.

Museum 2, a museum that has been using their more collaborative exhibition development model for many years, also cited time as a challenge. In a similar vein, participants explained, “Whenever you use the collaborative method, it requires more time because you have more people around the table and every person is different, and has their own perspective and expertise, which is beneficial but also means you have to have more conversations.” Participants at this museum said they are constantly looking for ways to communicate more efficiently in order to reduce time, but while this is a struggle, it is one they feel is necessary for what they believe are more memorable and engaging experiences for their visitors.

Museum 1 briefly addressed time as a factor for the same reasons that others offered: “It’s very challenging in that it takes more time, it takes a lot more communication and it takes a real direct communication.” One of the ways in which they have managed this issue of time for extra communication has been to use project management tools such as Trello and Slack:

“We have the exhibit schedule through Trello, so we keep track of deadlines and tasks that (each is responsible for) on Trello. That’s the way we stay in communication with each other about upcoming deadlines and what’s completed. Then the whole staff participates in “slack” so we have a slack channel for exhibitions where it’s not just the core exhibitions team who can say things about exhibitions, but all staff can push ideas, or they can give feedback on exhibit content documents or things like that.”

By organizing their time within the project management schedules and tools, those kinds of questions are out of the way, and there is more time to have more direct conversations about ideas and feedback that will move projects further than they would have had they spent extra time figuring out what they needed to be doing.

Museum 4 did not mention time as a major challenge that they face, rather, they focused more on the root cause of time-based issues, which is managing effective communication. Presumably, this is due to the fact that they do not have an “ideal path mapped out” for their

collaborative exhibition model, and so each exhibition that they do “hinges on the curator’s personality and what their working style (and comfort level) is.”

### Comfort

Comfort refers to the level of comfort that staff members have with the collaborative process. According to Lencioni (2002) this feeling of discomfort is actually a team dysfunction, such as a lack of trust or commitment to a given project. These dysfunctions manifest themselves in actions such as when people disagree with something, they feel they cannot contribute or speak up, or choose not to share their feelings to their teammates. Case study participants described instances of staff discomfort that they felt were rooted in staff’s lack of familiarity with collaborative methods, and the need for directness in communication.

Museum 1 highlighted this discomfort by saying that communication was their greatest challenge. As one participant stated, “With that kind of model there comes a lot of need to really clearly communicate and collaborate in ways that have not been ingrained on the staff or are different. The biggest challenge is just making sure that we aren’t over communicating and working together.” This discomfort around decision-making collaboratively, and direct communication (or candor) is something that Museum 4 also mentioned, in the context of staff over communicating. When staff is uncomfortable with the collaborative process they will stop participating and avoid making any definite decisions to avoid feeling like a “tyrant.” Museum 3 participants also explained that because their process is newer, there is a lack of comfort around making major decisions. They openly acknowledged this is happening, and that trying to find a way to prevent one person from having more authority than others has lead them to seek an impartial project manager:

“Even though this is a collaborative process, having really strong management through that process is really key. And that part is tough because I think as people are learning how to collaborate, you want people to work in a very flat structure. There still has to be someone at the end of the day who is saying this is the idea we're going to go forward with, this is the time that it has to be done, for everyone to be really clear what the expectations are for them as individuals as well as for the team.”

### Communication Breakdowns

Participants at Museums 1 and 2 discussed how their museums handled disagreements, as they felt this was an important challenge on which to improve. Participants shared how they manage communication breakdowns at their institutions. Museums 3 and 4 did not describe incidents or examples of how they handle disagreements. That is not to say that they do not have them, but that they see other issues as greater challenges to their process at this time.

Participants at Museum 2 stated that when their team is at loggerheads they have learned to deal with things by consensus:

“The hardest thing, and I've been fortunate because I haven't really experienced a show here like this, but I can imagine that if you came to loggerheads, two or three of your team members getting them to agree on something, you know just like anything else they could do with the groups that benefit the older model where there's one project leader thinking they know we're doing it this way. But this might be the wrong decision. So, the best thing about this and the shows I've worked on is we've talked things out and agreed on a plan. And so that's ideally how that would work.”

Another respondent from Museum 2 indicated that they are finding motivation in reaching consensus so they do not have to report up to leadership and extend the process:

“Occasionally if the team is at loggerheads, then you know one or more members may reach up to their supervisor and the senior leadership team. I think that's actually a good motivator for reaching consensus usually. When I came here, something that really surprised me was I when was talking to our Chief Curator and Director of Presentation. [Someone on their team] was having an issue and I was raised to get in there and do the mediation and they were like "no, no, let's push it back down, they'll work this out" and tell them to "keep working at it" The problem got resolved, and I thought it was beautiful.”

## Chapter 5: Conclusions and Implications

The purpose of this research study was to describe new and different exhibition development models in art museums, by exploring a) the characteristics of these new and different models; b) practitioners' perspectives of how these models have benefitted them personally, and their institution more broadly; and c) the challenges these models present in implementation, and how these challenges are mitigated. Using a case study design, data were collected through semi-structured focus groups and document analysis at 4 art museums. This chapter summarizes conclusions from the study, situating the findings within the literature, and suggests further implications for practitioners and researchers.

### Conclusions

What are the characteristics of new exhibition development models that make them different from a traditional, curatorial exhibition development model?

The findings of this study suggest that the new and different exhibition development models studied here are collaborative and intentionally democratic in nature. They are made of teams and leadership groups that both create and guide exhibitions from start to finish. By bringing a multitude of voices and perspectives into the process two things are achieved: 1) a shared sense of responsibility and authority; and 2) a fluid exchange of ideas and expertise within and across departments.

The need for shared responsibility and authority in exhibition development is reflected in a paradigmatic field-wide shift towards more democratic and visitor-centered ways of working (Anderson, 2012). Traditional curatorial authority in the past has at times prevented museum professionals with other areas of expertise – for example, education, marketing, and design –

from communicating and contributing to exhibition development (Isble, 2010). The shift from a linear, curatorial exhibition development model has resulted in exhibition development models that are more inclusive, ones that embrace ideas coming from more and unexpected places.

Case study museums described have well-defined processes for exhibition development. These processes identify specific roles, tasks, and strategies that are maintained across all their exhibitions. There is literature that discusses these processes generally, identifying that museums with teams have strategies and outcomes, and specifically, going so far as to categorize specific types of team models that exist such as the Broker, Developer, or Team model (Kamien, 2001; Rowson Love, 2013; Smithsonian, 2012). The reason behind these specific changes in roles, tasks, and strategies, however, are not as clear in the current literature.

As a result of having well-defined processes, case study museums felt that they have largely prevented the exercise of curatorial authority in a unilateral way. These new and different exhibition development models have forced democratic and collaborative work. Results from case study sites also indicated that well-defined processes strengthen teamwork because they require collaboration in order to move forward and complete tasks. They also foster a shared clarity of purpose, strengthening the shared vision of the team and the museum for a given exhibition (Chiodo, 2010).

Being outcomes-oriented illustrated that these case study museums consider the visitor in what they do, and that they are looking at what motivates the visitor in order to encourage more meaningful visits (Falk, 2009). Case study museums developed interpretive plans, “experience documents,” or theories of change and exhibition format documents for both specific exhibitions, as well as for the museum at large in order to make sure visitors are getting the most out of exhibitions and interpretive material. When visitors needs and motivations are accounted for in

the development process, exhibitions can create deeper personal connections and learning experiences (Falk, 2009; Rand, 2016).

What are the perceived benefits of these new models of exhibition development?

Collaborative exhibition development teams with well-defined processes and a strong focus on visitor-centered outcomes feel successful. These characteristics of exhibition development foster a sense of personal buy-in and clarity of purpose, and of being visitor-centered.

Results indicated that feeling respected, included, and proud of their work made participants want to contribute and do better. This builds the foundations for high performing teams (Lencioni, 2002). Inclusive practices promoted a continued perception of success because case study museums felt their practice aligned with new paradigms in museological practice. When teams feel successful, they feel motivated (Lencioni, 2002).

Moreover, participants felt that having a clear sense of what needed to be done and why it is important forced staff at these case study museums to work in tandem. Being aligned organizationally, and having a clear and shared purpose meant that staff were more highly engaged in exhibition development, and committed to a common vision or goal (Chiodo, 2010; Lencioni, 2002).

What are the challenges of implementing new development models, and the strategies used to mitigate them?

Results indicated that the major challenges of implementing new development models were rooted in team dynamics, and building trust in communications. At almost all case study museums, respondents explained that they felt “time” was their greatest challenge in a

collaborative exhibition development process. The extra time that they mention is due to the implementation of a well-defined process that requires more communication in order for it to work effectively. It takes more time to communicate effectively because there are more steps involved, and the fact that they are experiencing this is indicative of the fact that they are establishing an environment of trust that all voices will be heard, and respected. Case study museums are building a basis of trust through inclusive communication, and leveraging each other's strengths through cross-departmental collaboration.

It is important to note that communication breakdowns happen in collaborative exhibition development models. While disagreements may feel like a negative challenge, honest communication and disagreements are important to getting to the root of problems, and finding solutions as a team. Lencioni's framework for team dynamics reinforces this finding, by showing those disagreements are signs that teams are directly confronting problems and not avoiding uncomfortable conversations (2002).

### **Implications**

The results of this study demonstrate the valuable nature of well-defined, democratic exhibition development process for museum professionals and the rewards of having clarity of purpose. The conclusions of this study may prove useful to exhibition teams who want to begin to practice collaboration in their own departments. The resulting data indicate two important requirements, "well-defined processes" and "outcome-oriented," that practitioners would need to contextualize these results for their own institution, then begin to develop their own process.

The results of this study imply that art museums using collaborative exhibition development processes foster a greater sense of inclusion, a greater emphasis on visitor learning

and involvement, and a clarity of purpose that traditional curatorial models do not provide. Art museums would benefit from transitioning to collaborative exhibition development models for most, if not all of their exhibitions for the reasons above. To begin this process, leadership at museums that must look to other collaborative institutions, and results from research such as this for guidance on how to create well-defined processes, and what it means to be outcomes-oriented and collaborative. Museums should consider deeply how collaborative processes and team dynamics are intertwined and affect one another. Successful collaboration is dependent upon a clear definition of success, and a basis of trust. A more collaborative exhibition development process will see educators as part of the development process at the very onset of ideation, and it will see shift in curatorial authority from a sole curator to those whose stories are being told, and those who the museum seeks to serve.

Across all sites, the participants spoke of the positive impacts that these new exhibition development models have had on their visitors. However, this study focused on the museum professional's perceptions of the benefits of collaborative exhibition development. Research has been done on “visitor-centered museums” but there is little extensive research of visitor perceptions of the exhibitions that are developed in collaborative ways. Further research along these lines would strengthen professionals’ understanding of the challenges and benefits of collaboration in museums, and give more credence and clarity to the impacts of such collaboration on the visitors. Such a study would investigate visitor experiences in collaboratively developed exhibitions. This study might include an observational component in which visitors are listened to and observed in exhibition spaces for evidence of feelings of inclusion, personal connections, or inspiration. These indicators would be dependent upon the topic of particular exhibits, as well as rooted in research on visitor motivations and experiences

in museums. Such research may inspire museum professionals to find their own ways of creating new and different ways of developing museum exhibitions.

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## Appendix A Informational Sheet

### Experiments in Museum Exhibition Development Processes Graduate Thesis Study – University of Washington

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**Who:**

- Caitlin Mosher – Masters Candidate, Museology- University of Washington
- Jessica Luke, PhD – Committee Chair, Museology – University of Washington

**What:**

A Graduate research study to describe practitioner perspectives of new and different exhibition development models in art museums.

**Research questions that will guide this study:**

- What are the characteristics of these new models that make them different from the traditional, curatorial model?
- What are the perceived benefits of these new models of exhibition development?
- What are the challenges of implementing new development models, and the strategies used to mitigate them?

**When:**

February through March 2018

**Entails:** Short over-the phone interview

**Why:**

This is original research on the field of museum exhibitions with a focus on understanding different methods of exhibition development. The study is richer with participation from museums such as yours, with the end goals being to contextualize the results within the larger museum community

Please contact me or my thesis chair if you have any questions. Thank you again for your consideration

caitmg13@uw.edu

## **Appendix B**

### **Description of Consent Talking Point for Phone Interviews**

Experiments in Museum Exhibition Development Processes  
Caitlin Mosher  
Museology Graduate Program

Consent talking points will include the following:

- Data collector's name and affiliation;
- Purpose of the study;
- Voluntary nature of participation, and that there are no consequences for choosing not to participate;
- Participation involves a 60-90 minute phone conversation that will be recorded; only the research team will hear the recordings;
- Subject's responses will remain confidential; subjects may be quoted, but without any identifying information;
- Please introduce yourselves before you share something
- Name and phone number of a study contact person

## Appendix C

### Instrument

#### Interview Guide

- 1) How long has your current model of exhibition development been in place?
- 2) What problem or problems was this model of exhibition development designed to solve?
- 3) What is the process for developing an exhibition, from concept to installation? Let's start with the first step...
  - a) Where do exhibition ideas come from?
  - b) How are ideas approved or denied? Who is involved in the approval/denial process?
  - c) What happens after an idea or concept is approved?
  - d) Who moves it forward? (Assuming it's a team) how are team members identified? How do they work together? Who is in charge? How often do they meet? Where are non-curatorial staff brought in, and what roles do they play?
  - e) How are others in the institution involved in the exhibition development process along the way? How important is cross-departmental collaboration within your process?
- 4) Do exhibitions have goals? Objectives? Visitor outcomes?
  - a) If yes, who develops them? How are they used throughout the exhibition development process?
  - b) If no, why not?
- 5) How do you use evaluation and visitor research in the design and development process?
- 6) In what ways do you think this new model has been beneficial?
  - a) How has it benefitted your institution?
  - b) How has it benefitted you and your practice in your museum?
  - c) How does it benefit the visitors?
- 7) What has been the BIGGEST challenge within this exhibition development process?
  - a) How do you deal with that challenge?

Thank you for your time! Do you have any questions, or is there anything else you'd like to share with me?