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# EXHIBITS SELF-ASSESSMENT WORKBOOK 2018

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## Acknowledgments

The *Exhibits Self-Assessment Workbook* was developed to provide a series of simple questions to help our members determine to what degree they meet the MAS standards for how exhibits should be planned, designed, programmed and evaluated. Members can use their scores to identify areas in which their exhibition practices can be improved. The self-assessment workbook also provides our members with the opportunity to record and track changes and improvements over time.

The *Exhibits Self-Assessment Workbook* for Saskatchewan Museums was written by John Summers. Kathleen Watkin, MAS Advisor, facilitated the project on behalf of MAS with the guidance of Wendy Fitch, Executive Director. Graphic Design work was completed by Michelle Brownridge, MAS Community Engagement Coordinator. The members of the MAS community were consulted and provided valuable feedback.

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Assistance and further information about the *Exhibits Self-Assessment Workbook* can be obtained from:

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## Exhibits Self-Assessment

The exhibit-related questions in this book will help you to evaluate where you are doing well and where you can improve your museum's exhibits. Each question is followed by performance indicators (Gold, Silver and Bronze levels), together with tips for moving to the next level. Each performance indicator has criteria listed for the sub-divisions to assist you in assessing your current level, together with suggestions as to how you can improve.

Three appendices at the end of the manual offer tools to help you do this. By creating an Institutional Exhibit Plan (Appendix 1) you will give your museum a multi-year roadmap to guide exhibit development. For each exhibit outlined in this plan, the Exhibit Brief (Appendix Two) will get the project off to a good start and guide it along the way. At the end of each exhibit, completing a "Lessons Learned" assessment (Appendix Three) will record what you have learned so you can apply the insights to your next project.

The effort put into improving the planning, delivery and evaluation of your exhibits will be repaid many times over in the professionalization of your institution, the regard of your peers in the museum community and, most importantly, the quality of your visitors' experiences. Just as you plan a particular exhibit, you can also make a plan for improving all of your exhibits. Use the information in this book to break down each area for improvement into tasks and a manageable long-term work plan that is achievable with the resources at your disposal. Be candid with your board, staff and volunteers about where your institution is now and involve them all in helping you improve your practices.

It may seem daunting at first to read this manual and look down the road ahead to better exhibits. If you understand, however, that whatever the size of your institution, staff or budget, you can always improve your exhibit practices, it might not seem such a challenge. A lot of staff and a large budget are in themselves no guarantee of an excellent exhibit, just as a small staff and a modest budget are not necessarily barriers to creating a first-rate visitor experience.

Exhibits are about more than just graphics and exhibit cases. At their heart, they are about something you probably already do every day that your museum is open: creating stories that connect the artifacts and artwork in your collections with the visitors who walk through your doors. By creating an institutional culture of learning and continuous improvement, and realizing that no exhibit is perfect, you will put in place the resources to ensure that each of your exhibits will be better than the one before it.

## How to Use This Manual

This manual is divided into 6 sections:

1. General (G)
2. Exhibits General (EG)
3. Planning & Development (PD)
4. Virtual (V)
5. Evaluation (E)
6. Programming & Communications (PC)
7. Conservation & Maintenance (CM)

1. With all Staff (Paid and Unpaid), review each *Standard(s) Based Question*, its *Associated Saskatchewan Museums Standard(s)* and *Why it is Important*.
2. Look at the *Performance Indicators* column and select the option(s) that best describe the present situation at your institution.
3. Use the *How to Improve/Maintain* section to allocate tasks for Staff (Paid and Unpaid) to undertake to improve the institution's performance in this area.
4. If your current situation is Bronze, use the steps listed in Graduate to Silver first, and then undertake the Graduate to Gold tasks. Your long-term goal should be to achieve the Gold status for each Standard.
5. Use the workbook columns to record the date each improvement task is completed as well as any relevant notes relating to the task.

Additionally, with the Staff (Paid and Unpaid),

1. Review each Section's *Tips and Hints*. Discuss any that might be useful to put into practice in your institution.
2. Review *Unacceptable and Non-Recommended Practices* with all Staff (Paid and Unpaid) to ensure these are clearly understood.
3. For additional information see *Further Resources* and/or contact MAS.
4. Every 2 years, review and reflect on each section. Make notes of your progress and areas for improvement and apply this information to your strategic and long-term planning goals.

## Unacceptable and Non-Recommended Practices

Regardless of where your institution is in meeting the standards and in using this manual to improve your exhibitions, certain practices are unacceptable and/or not recommended under any circumstances.

### Unacceptable Practices

1. Creating exhibits and/or related programs that appropriate the voices, beliefs and/or material culture of other cultural communities.
2. Creating exhibits and/or related programs that present the voices, beliefs and/or material culture of other cultural communities without engaging in appropriate consultation with those communities.
3. Creating exhibits and/or related programs that knowingly present information that is false and/or not supported by evidence or research.
4. Creating exhibits that do not meet recognized standards for accessibility.
5. Creating virtual exhibits that do not meet recognized standards for online accessibility.
6. Creating exhibits that put visitors or collections at risk of harm.

### Non-Recommended Practices

1. Not developing related programs concurrently with the exhibit, itself.
2. Not allocating financial resources for exhibits in the institution's operating and/or capital budgets.
3. Not allocating staff resources for exhibit development and evaluation.
4. Creating "permanent" exhibits that never change.



## General Standards

Exhibits are a conversation between museums and the communities that they serve and represent. A well-managed exhibit program engages with both the museum's internal (Board, Paid and Unpaid Staff, Members) and external communities to develop, present and evaluate its exhibits.

The kind of internal and external engagement required to develop exhibits should not be something added on just for the project but should be built into the structure of your organization. The values of openness, engagement and inclusion that drive exhibit development should be core parts of your museum's organizational culture.

### **Tips and Hints:**

- Engage the whole institution in exhibit development and evaluation.
- Show your organizational values in the exhibits you create.
- Strive for accessibility and inclusion and ensure that these values are embodied by staff (paid and unpaid) at every level of your museum.
- Consider holding a workshop session or sessions for your museum's board members to share with them how you plan, develop, create and evaluate exhibits.

Standard(s) Based Questions	Why it is Important	Performance Indicators
<p>G1: Does the institution engage appropriately with all of the cultural communities that comprise its audience and/or whose material culture is represented in its collections?</p> <p><i>Associated Saskatchewan Museums Standard(s):</i> A4, A5, A6, A7, A11, A23, A31, A43, A45, A48, A49C-B20</p>	<p>Museums can hold legal title to objects in their collections but they do not and cannot “own” the cultures or beliefs inherent in those objects.</p> <p>Museums must engage with those communities when they research and seek to understand those objects and when they wish incorporate them into exhibits and related programs.</p>	<p><u>Gold:</u></p> <p><input type="checkbox"/> The institution makes meaningful use of the information and insights gained during community engagement.</p>
		<p><u>Silver:</u></p> <p><input type="checkbox"/> The museum practices active listening at an organizational level when engaging with the communities represented in its collections and exhibits.</p>
		<p><u>Bronze:</u></p> <p><input type="checkbox"/> The institution does not engage with the communities represented in its collections and exhibits.</p>

How to Improve/Maintain	Date Completed	Notes
<p><u>Maintain Gold:</u></p> <p>Demonstrate the institution's commitment to engagement by showing the results in exhibits and related programming Make engagement consultation core institutional values.</p>		
<p><u>Graduate to Gold</u></p> <p>Develop protocols for engagement and consultation by working with the communities involved. Proceed respectfully and carefully.</p>		
<p><u>Graduate to Silver:</u></p> <p>Identify and reach out to all of the cultural communities that comprise the museum's audience and/or whose material culture is represented its collections. Be sensitive to their concerns, and respect their wishes about which stories they do and do not wish to be told, and in what manner. Offer your museum as an ally of these communities.</p>		

Standard(s) Based Questions	Why it is Important	Performance Indicators
<p>G2: Does the institution involve participants beyond the institution's board, staff (paid and unpaid) and members in the development of exhibits and related programming?</p> <p><i>Associated Saskatchewan Museums Standard(s): A8, A9, A10, A42, A43</i></p>	<p>Exhibits are a conversation between museums and the communities that they serve and represent. A well-managed exhibit program engages with both the museum's internal (Board, Paid and Unpaid Staff, Members) and external communities to develop, present and evaluate its exhibits.</p>	<p><u>Gold:</u></p> <p><input type="checkbox"/> The institution invites members of the cultural communities that comprise its audience and/or whose material culture is represented its collections to join governing boards, advisory boards, committees and/or working groups and well as participate in exhibition planning.</p>
		<p><u>Silver:</u></p> <p><input type="checkbox"/> The institution carries out consultation for individual exhibit projects.</p>
		<p><u>Bronze:</u></p> <p><input type="checkbox"/> The institution does not engage with the communities represented in its collections and exhibits.</p>

How to Improve/Maintain	Date Completed	Notes
<p><u>Maintain Gold:</u></p> <p>Offer governing boards, advisory boards, committees and/or working group members meaningful opportunities to participate in decision-making during exhibit and program development.</p>		
<p><u>Graduate to Gold</u></p> <p>Apply a consultative and community-based to your museum's exhibit and program development.</p>		
<p><u>Graduate to Silver:</u></p> <p>Prepare an Institutional Exhibit Plan (Appendix 1) that involves community consultation.</p>		

Standard(s) Based Questions	Why it is Important	Performance Indicators
<p>G3: Does the institution develop exhibits that are physically and intellectually accessible?</p> <p><i>Associated Saskatchewan Museums Standard(s): A12, A17, A31, A69</i></p>	<p>Our understanding of accessibility has evolved from considering it strictly in terms of a binary able/disabled distinction to a much broader realization of the continuum of levels of ability through which we may all pass at some point during our lives. It is not as simple as saying that one is able or disabled, or that something is accessible or inaccessible.</p> <p>For example, the younger version of you might have had no trouble turning a knob in an interactive exhibit, but the older version of you might not be able to easily or at all. You are the same person, neither able nor disabled, but have differing levels of ability at different times.</p>	<p><u>Gold:</u></p> <p><input type="checkbox"/> The institution has incorporated the results of accessibility audits of its exhibits and programs into its policies, procedures and practices.</p>
		<p><u>Silver:</u></p> <p><input type="checkbox"/> The institution has conducted accessibility audits of its exhibits and related programs.</p>
		<p><u>Bronze:</u></p> <p><input type="checkbox"/> The institution has not reviewed its exhibits and programs to identify accessibility issues.</p>

How to Improve/Maintain	Date Completed	Notes
<p><u>Maintain Gold:</u></p> <p>Regularly conduct accessibility audits of exhibits and related programs and keep up to date with changes in legislation, standards and best practices.</p>		
<p><u>Graduate to Gold</u></p> <p>Incorporate the results of accessibility audits of exhibits and programs into the museum's policies, procedures and practices.</p>		
<p><u>Graduate to Silver:</u></p> <p>Familiarize the Museum's Board and Staff (Paid and Unpaid) with the relevant Provincial and Federal legislation.</p>		

Standard(s) Based Questions	Why it is Important	Performance Indicators
<p>G4: Does the institution engage all of its internal constituencies, including board, staff (paid and unpaid) and members in the exhibit development process?</p> <p><i>Associated Saskatchewan Museums Standard(s): A42</i></p>	<p>Exhibits are not the sole responsibility of curators. The best exhibits come out of a combination of all of the institution's voices and perspectives.</p>	<p><u>Gold:</u></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> The institution ensure that all museum members are engaged in exhibit planning by putting in place policies and procedures to support it.</li> </ul>
		<p><u>Silver:</u></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> The institution carries out exhibition development by including the participation of all members of the internal team (board, staff and members).</li> </ul>
		<p><u>Bronze:</u></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> The institution does not involve all of the Internal Team (board, staff [paid and unpaid] and members) in exhibit development.</li> </ul>



How to Improve/Maintain	Date Completed	Notes
<p><u>Maintain Gold:</u></p> <p>Formalize the team approach to exhibit development by supporting it with policies and procedures.</p>		
<p><u>Graduate to Gold</u></p> <p>Begin developing exhibits with the internal team identified in your Institutional Exhibit Plan (Appendix 1).</p>		
<p><u>Graduate to Silver:</u></p> <p>Prepare an Institutional Exhibit Plan (Appendix 1) that involves identifying who at your museum could and should be involved in exhibit development.</p>		

Standard(s) Based Questions	Why it is Important	Performance Indicators
<p>G5: Does the institution foster an open, thoughtful and inclusive organizational culture around the development of exhibits and related programs?</p> <p><i>Associated Saskatchewan Museums Standard(s): A42</i></p>	<p>Exhibits are manifestations of a museum's organizational culture. The kind of organization you are will affect the exhibits and programs you create.</p>	<p><u>Gold:</u></p> <p><input type="checkbox"/> The institution's leadership team sets an example by embodying the virtues of thoughtfulness and inclusion.</p>
		<p><u>Silver:</u></p> <p><input type="checkbox"/> The institution regularly involves a broad range of the internal team in exhibit and program development.</p>
		<p><u>Bronze:</u></p> <p><input type="checkbox"/> The institution does not involve a broad range of the internal team in exhibit and program development.</p>

How to Improve/Maintain	Date Completed	Notes
<p><u>Maintain Gold:</u></p> <p>Set the expectation that all participants in exhibit and program development will embody the virtues of thoughtfulness and inclusion. Model the desired behaviours and attitudes.</p>		
<p><u>Graduate to Gold</u></p> <p>Involve the museum's senior leadership in exhibit and program development, not just as approvers, but as full participants in the process.</p>		
<p><u>Graduate to Silver:</u></p> <p>Broaden the participation of Board and Staff (Paid and Unpaid) in exhibit and program development.</p>		



## Exhibit General Standards

The museum should be committed to the continuing development and evaluation of its exhibits, and this commitment should be demonstrated through allocating staff, budget and workspaces to exhibits.

Good exhibits are both physically and intellectually accessible and embody the principles of universal design. Some useful resources are:

- Smithsonian Guidelines for Accessible Exhibition Design. Available as a pdf download from <https://www.si.edu/Accessibility/SGAED>
- Association of Registered Graphic Designers of Ontario guidelines for accessible graphic design. Available as a pdf download from: [https://www.rgd.ca/database/files/library/RGD\\_AccessAbility\\_Handbook.pdf](https://www.rgd.ca/database/files/library/RGD_AccessAbility_Handbook.pdf)
- Saskatchewan Government resources for accessibility:
  - <https://www.saskatchewan.ca/government/visual-identity-and-protocol/digital-standards-and-framework/usability-and-accessibility/web-accessibility>
  - [http://saskatchewanhumanrights.ca/pub/documents/accessability/Building\\_Standards\\_%20Code.pdf](http://saskatchewanhumanrights.ca/pub/documents/accessability/Building_Standards_%20Code.pdf)
  - <http://saskatchewanhumanrights.ca/learn/accessibility>
  - <https://www.saskatchewan.ca/business/housing-development-construction-and-property-management/building-standards-and-licensing/building-and-accessibility-standards>
- Principles of Universal Design: <http://www.universaldesign.com/what-is-ud/>

### **Tips and Hints:**

- Research other institutions' exhibit policies to determine best practices and find out what has worked (and not worked) for them.
- Join provincial, regional and national museum organizations to gain access to their resources, particularly examples of other institutions' policies and procedures.
- Look for opportunities to orient and train staff. Consider joining together with other museums to leverage support for training and development.
- Work with the educational community and certified teachers to understand different learning styles and apply them to your exhibit-making.
- Create budget lines specifically for exhibit development and evaluation, even if the amounts available are small. Seek to gradually increase those resources in each succeeding budget.

Standard(s) Based Questions	Why it is Important	Performance Indicators
<p>EG1: Does the institution support the development, maintenance and evaluation of exhibits with approved policies and procedures?</p> <p><i>Associated Saskatchewan Museums Standard(s): A21, A41, A79, M-G41</i></p>	<p>Policies are the ground rules for how a museum does business and what its priorities are. If it is important to the mission, it should be reflected in one or more policies.</p>	<p><u>Gold:</u></p> <p><input type="checkbox"/> The institution regularly reviews and updates the policies and procedures which support the development, maintenance and evaluation of exhibits</p>
		<p><u>Silver:</u></p> <p><input type="checkbox"/> The institution has policies and procedures in place to support the development, maintenance and evaluation of exhibits</p>
		<p><u>Bronze:</u></p> <p><input type="checkbox"/> The institution does not have policies and procedures in place to support the development, maintenance and evaluation of exhibits</p>

How to Improve/Maintain	Date Completed	Notes
<u>Maintain Gold:</u>  Regularly review and update policies and procedures regarding exhibit and program development		
<u>Graduate to Gold</u>  Draft policies and procedures regarding exhibit and program development for Board approval.		
<u>Graduate to Silver:</u>  Research other museums' policies and procedures regarding exhibit and program development and develop an understanding of best practices in this area.		

Standard(s) Based Questions	Why it is Important	Performance Indicators
<p>EG2: Does the institution support the development and maintenance of exhibits with staffing, training and appropriate work and display spaces?</p> <p><i>Associated Saskatchewan Museums Standard(s):</i> A22, A50, A52, M-G34, C-B46, C-B50, C-C27</p>	<p>The goals and objectives represented by policies will not be realized unless the appropriate resources are committed</p>	<p><u>Gold:</u></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> The institution creates dedicated operating budget lines for exhibit development and maintenance.</li> <li><input type="checkbox"/> The institution includes exhibit development and maintenance in the job descriptions of the appropriate Staff (Paid and Unpaid).</li> </ul>
		<p><u>Silver:</u></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> The institution allocates funding from its operating budget for exhibit development and maintenance. The institution includes exhibit development and maintenance in the job descriptions of the appropriate Staff (Paid and Unpaid).</li> </ul>
		<p><u>Bronze:</u></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> The institution does not formally allocate human and financial resources for exhibit development and maintenance</li> </ul>



How to Improve/Maintain	Date Completed	Notes
<p><u>Maintain Gold:</u></p> <p>The institution regularly reviews funding opportunities for exhibit development and aligns its budget development process with the scheduled exhibits in its Institutional Exhibit Plan (Appendix 1).</p>		
<p><u>Graduate to Gold</u></p> <p>The institution creates dedicated operating budget lines for exhibit development and maintenance.</p>		
<p><u>Graduate to Silver:</u></p> <p>Using information from its Institutional Exhibit Plan (Appendix 1), the institution determines the human and financial resources required to develop and maintain the exhibits scheduled in its plan.</p>		

Standard(s) Based Questions	Why it is Important	Performance Indicators
<p>EG3: Does the institution develop exhibits that are accessible to a variety of learning styles?</p> <p><i>Associated Saskatchewan Museums Standard(s): A27, A69</i></p>	<p>There is no single learning style or type of media that will best meet the needs of all of the museum's audiences. Good exhibits include a range of styles and media to increase opportunities for audience engagement.</p>	<p><u>Gold:</u></p> <p><input type="checkbox"/> The institution outlines the learning styles that will be addressed in each exhibit and selects the most appropriate media for each one</p>
		<p><u>Silver:</u></p> <p><input type="checkbox"/> The institution is familiar with the literature on learning styles and with different means of expression as they pertain to exhibits.</p>
		<p><u>Bronze:</u></p> <p><input type="checkbox"/> The institution does not take account of learning styles or types of media when developing exhibits and programs</p>

How to Improve/Maintain	Date Completed	Notes
<p><u>Maintain Gold:</u></p> <p>Conduct ongoing professional development training for Staff (Paid and Unpaid) including workshops, conferences and self-study, to keep current with the literature on learning in museums</p>		
<p><u>Graduate to Gold</u></p> <p>When developing an exhibit brief (Appendix 2), identify the learning styles of the intended audience(s) and show how the proposed means of expression are compatible with them.</p>		
<p><u>Graduate to Silver:</u></p> <p>Carry out a research project to identify learning styles applicable to museum exhibits, add relevant reference materials to the museum's library and carry out training and orientation for Staff (Paid and Unpaid)</p>		

Standard(s) Based Questions	Why it is Important	Performance Indicators
<p>EG4: Does the institution develop exhibits that take into account all relevant ethical and legal codes, standards and guidelines?</p> <p><i>Associated Saskatchewan Museums Standard(s):</i> A26, A37, A39, A40</p>	<p>Ignorance of the law is not an excuse. Museums should explicitly state their commitment to all relevant codes of ethics, standards of practice and guidelines and monitor their compliance.</p>	<p><u>Gold:</u></p> <p><input type="checkbox"/> The institution explicitly states, in its online and published materials, its adherence to all relevant ethical and legal codes, standards and guidelines and ensures that its exhibits and programs are compliant.</p>
		<p><u>Silver:</u></p> <p><input type="checkbox"/> The institution has identified ethical and legal codes, standards and guidelines which are relevant to its exhibit development and trained and oriented staff to their implications.</p>
		<p><u>Bronze:</u></p> <p><input type="checkbox"/> The institution has not investigated what ethical and legal codes, standards and guidelines might be relevant to its exhibit development.</p>

How to Improve/Maintain	Date Completed	Notes
<p><u>Maintain Gold:</u></p> <p>The institution makes the monitoring of its ongoing compliance with all relevant ethical and legal codes, standards and guidelines the responsibility of a member of Staff (Paid or Unpaid) or a Board or Staff Committee.</p>		
<p><u>Graduate to Gold</u></p> <p>Conduct a training and information session(s) for Staff (paid and Unpaid) and Board to acquaint them with all relevant ethical and legal codes, standards and guidelines and create a plan to bring the museum into compliance.</p>		
<p><u>Graduate to Silver:</u></p> <p>Research and identify all relevant ethical and legal codes, standards and guidelines related to the development of exhibits and programs.</p>		

Standard(s) Based Questions	Why it is Important	Performance Indicators
<p>EG5: Does the institution develop exhibits that facilitate accessibility through adherence to recognized design and user-friendly standards?</p> <p><i>Associated Saskatchewan Museums Standard(s):</i> A28, A29, A34, A36</p>	<p>Exhibits that are not high quality will fail as public experiences if their content and visitor experiences are not intellectually and physically accessible.</p>	<p><u>Gold:</u></p> <p><input type="checkbox"/> The institution has applied relevant design and user-friendly standards in the design and development of its exhibits and carried out formative evaluation to understand whether the intended visitor experience will be successful.</p>
		<p><u>Silver:</u></p> <p><input type="checkbox"/> The institution subscribes to the principles of Universal Design and incorporates them into its exhibit design and development.</p> <p><i>Universal Design is the design of the environment so that it can be accessed, understood and used to the greatest extent possible by all people regardless of their age, size, ability or disability.</i></p>
		<p><u>Bronze:</u></p> <p><input type="checkbox"/> The institution has not taken account of design and user-friendly standards in the design and development of its exhibits.</p>

How to Improve/Maintain	Date Completed	Notes
<p><u>Maintain Gold:</u></p> <p>Incorporate the results of formative evaluation into current and future exhibit projects.</p>		
<p><u>Graduate to Gold</u></p> <p>Apply user-friendly and design standards, particularly the principles of Universal Design, to exhibit design and development.</p> <p>Carry out formative evaluation.</p>		
<p><u>Graduate to Silver:</u></p> <p>Carry out a research project to identify design and user-friendly standards applicable to museum exhibits, add relevant reference materials to the museum's library and carry out training and orientation for Staff (Paid and Unpaid)</p> <p>Carry out an accessibility audit by walking through your building and exhibits and looking for barriers to access such as stairs, sills, doors opening the wrong way, narrow hallways, light levels that are too low, text that is too small and so on.</p>		

Standard(s) Based Questions	Why it is Important	Performance Indicators
<p>EG6: Does the institution develop exhibits that include perspectives beyond that of the institution itself?</p> <p><i>Associated Saskatchewan Museums Standard(s): A24</i></p>	<p>Museums must be mindful of the institutional tone of voice in which they speak to their communities and work to incorporate a range of voices and perspectives.</p>	<p><u>Gold:</u></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> The institution offers opportunities for co-curation with communities outside its walls when developing exhibits and programs.</li> </ul>
		<p><u>Silver:</u></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> The institution engages with communities outside its walls when developing programs and exhibits and takes external perspectives into account.</li> </ul>
		<p><u>Bronze:</u></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> The institution does not engage with communities outside its walls when developing programs and exhibits.</li> </ul>



How to Improve/Maintain	Date Completed	Notes
<p><u>Maintain Gold:</u></p> <p>Use the results of engagement and consultation in exhibits and offer opportunities for others to co-create and co-curate your exhibits</p>		
<p><u>Graduate to Gold</u></p> <p>Develop a strategy for engaging external communities and implement it. Also, use it to identify relevant issues and concerns.</p>		
<p><u>Graduate to Silver:</u></p> <p>Identify external communities with which the museum could be and/or should be engaged.</p> <p>Review the ways in which the museum could engage with these communities through consultation and through seeking out best practices and examples from other institutions.</p>		

Standard(s) Based Questions	Why it is Important	Performance Indicators
<p>EG7: Does the institution develop and present exhibits in a way that puts neither visitors nor artifacts at risk?</p> <p><i>Associated Saskatchewan Museums Standard(s):</i> A32, A33, A35, A38, A51, A73</p>	<p>The exhibit experience should be safe for both visitors and the artifacts on display.</p>	<p><u>Gold:</u></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> The institution plans and carries out regular exhibit maintenance.</li> <li><input type="checkbox"/> The institution orients visitors to the safe use of and appropriate behavior in exhibits.</li> <li><input type="checkbox"/> Museum staff monitor the safety of both visitors and artifacts through regular walk-throughs during open hours.</li> </ul>
		<p><u>Silver:</u></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> The institution carries out risk assessments for its exhibits, particularly with regard to interactive exhibits and programs.</li> <li><input type="checkbox"/> The institution carries out a conservation review of artifacts proposed for display to ensure that their use in an exhibit would not pose an undue risk to them or visitors.</li> </ul>
		<p><u>Bronze:</u></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> The institution does not incorporate risk assessments into its exhibit development process.</li> </ul>

How to Improve/Maintain	Date Completed	Notes
<p><u>Maintain Gold:</u></p> <p>Plan and carry out regular maintenance of galleries and exhibits, particularly interactive exhibits.</p>		
<p><u>Graduate to Gold</u></p> <p>Substitute replicas for original artifacts where unacceptable risks have been identified.</p> <p>Design interactive experiences to be safe and verify their operation through formative evaluation.</p> <p>Where unavoidable risks are present, identify them with appropriate signage and ensure that visitors are informed of safe procedures.</p>		
<p><u>Graduate to Silver:</u></p> <p>Carry out a risk assessment to identify potential hazards for both visitors and artifacts during the development of each new exhibit.</p>		

Standard(s) Based Questions	Why it is Important	Performance Indicators
<p>EG8: Does the institution develop exhibits that are relevant to its institutional mission and collections?</p> <p><i>Associated Saskatchewan Museums Standard(s):</i> A25, A30, A45</p>	<p>Exhibits are a means to achieving the museum's mission rather than an end in themselves.</p>	<p><u>Gold:</u></p> <p><input type="checkbox"/> The institution is readily able to demonstrate the relevance of exhibits and programs to its mission and collections and carries out evaluation to confirm this.</p>
		<p><u>Silver:</u></p> <p><input type="checkbox"/> The institution develops an institutional exhibit plan (Appendix 1) that evaluates proposed exhibit topics against core mandate and mission-related documents.</p>
		<p><u>Bronze:</u></p> <p><input type="checkbox"/> The institution is not able to identify how exhibits, either in-house or travelling, are relevant to its mission.</p>

How to Improve/Maintain	Date Completed	Notes
<p><u>Maintain Gold:</u></p> <p>Ensure that the exhibit and program experiences that are offered to visitors are intrinsically related to the institutional mission and collections.</p>		
<p><u>Graduate to Gold</u></p> <p>When new exhibits are proposed, either in-house or travelling, evaluate them using the criteria in the Institutional Exhibit plan (Appendix1) and select only the most relevant proposals for further development.</p>		
<p><u>Graduate to Silver:</u></p> <p>Prepare an Institutional Exhibit Plan (Appendix1) that identifies the relevant sections of core organizational documents.</p>		



## **Exhibit Planning & Development Standards**

Exhibits are more than just some artifacts with labels on them. Good exhibits offer an engaging and appealing visitor experience. There is always a place for the old standbys of "Treasures from the Collections," "New Acquisitions" and "Curator's Choice," but the majority of your exhibits should be about more than simply displaying objects and should advance the mission of your museum. Good exhibits can lead both your museum and your audience to learn and grow.

There is a large creative component to the development of exhibits, but they should be guided by a defined and well-organized process. As your most visible public product, your museum's exhibits should be part of a coherent communication plan that also includes print, digital and social media.

### **Tips and Hints:**

- Consider joining forces with other museums in a partnership to create and circulate travelling exhibits. By deciding on topics together and creating exhibits that suit each museum's gallery spaces, your museum can receive several travelling exhibits in return for creating one.
- If your museum does not have a communications plan and/or a brand identity, develop them.
- If your museum does have a communications plan and/or a brand identity, incorporate them into exhibit development.

Standard(s) Based Questions	Why it is Important	Performance Indicators
<p>PD1: Does the institution have a defined exhibit development process/policy plan?</p> <p><i>Associated Saskatchewan Museums Standard(s): A41</i></p>	<p>Exhibits are complex projects that need to be well-managed in order to be successful.</p>	<p><u>Gold:</u></p> <p><input type="checkbox"/> The institution periodically reviews its exhibit development process using summative evaluations of completed projects and the results of "Lessons Learned" feedback (Appendix Three).</p>
		<p><u>Silver:</u></p> <p><input type="checkbox"/> The institution develops and follows an organized process for developing exhibits and programs.</p>
		<p><u>Bronze:</u></p> <p><input type="checkbox"/> The institution does not follow an organized and documented process for developing exhibits and programs.</p>



How to Improve/Maintain	Date Completed	Notes
<p><u>Maintain Gold:</u></p> <p>After each exhibit project, carry out a "Lessons Learned" feedback exercise (Appendix Three) and incorporate the results into your next project.</p>		
<p><u>Graduate to Gold</u></p> <p>Use this process to develop new exhibits. Conduct an orientation session about the exhibit development process each time there are new participants.</p>		
<p><u>Graduate to Silver:</u></p> <p>Prepare an Institutional Exhibit Plan (Appendix 1) that identifies a process for exhibit development.</p>		

Standard(s) Based Questions	Why it is Important	Performance Indicators
<p>PD2: Does the institution begin the development of an exhibit with a mission document or exhibit brief (Appendix 2)?</p> <p><i>Associated Saskatchewan Museums Standard(s): A44</i></p>	<p>Good exhibits are characterized by clarity about the projects objectives. Beginning with an exhibit brief (Appendix 2) encourages the formulation of objectives.</p>	<p><u>Gold:</u></p> <p><input type="checkbox"/> The institution uses the exhibit brief (Appendix 2) to guide the evaluation of its exhibit projects.</p>
		<p><u>Silver:</u></p> <p><input type="checkbox"/> The institution has developed a template for an exhibit brief (Appendix 2) and uses it to guide exhibit development.</p>
		<p><u>Bronze:</u></p> <p><input type="checkbox"/> The institution does not begin the development of an exhibit with a mission document or exhibit brief (Appendix 2).</p>

How to Improve/Maintain	Date Completed	Notes
<p><u>Maintain Gold:</u></p> <p>Require that each new exhibit project begin with a brief. Use the exhibit brief (Appendix 2) outline to prepare exhibits proposed during the preparation of the Institutional Exhibit Plan (Appendix 1) for discussion and evaluation.</p>		
<p><u>Graduate to Gold</u></p> <p>Use the exhibit brief (Appendix 2) to guide the development of an exhibit and keep the process on track.</p>		
<p><u>Graduate to Silver:</u></p> <p>Prepare a Brief (Appendix 2) for a new exhibit project.</p>		

Standard(s) Based Questions	Why it is Important	Performance Indicators
<p>PD3: Does the institution establish learning outcomes or educational objectives for each of its exhibits?</p> <p><i>Associated Saskatchewan Museums Standard(s): A46</i></p>	<p>Without learning outcomes, it is difficult to shape the visitor experience and conduct a summative evaluation of the exhibit.</p>	<p><u>Gold:</u></p> <p><input type="checkbox"/> The institution uses the exhibit's learning objectives to conduct summative evaluation.</p>
		<p><u>Silver:</u></p> <p><input type="checkbox"/> The institution establishes learning objectives for the exhibit during the development of the exhibit brief (Appendix 2).</p>
		<p><u>Bronze:</u></p> <p><input type="checkbox"/> The institution does not establish learning outcomes for each of its exhibits.</p>

How to Improve/Maintain	Date Completed	Notes
<p><u>Maintain Gold:</u></p> <p>Carry out a summative evaluation of an exhibit to determine the extent to which learning objectives were achieved.</p>		
<p><u>Graduate to Gold</u></p> <p>Prepare learning objectives for a new exhibit project.</p>		
<p><u>Graduate to Silver:</u></p> <p>Research the relevant professional literature to understand what learning outcomes mean for museum exhibits, add relevant reference materials to the museum's library and carry out training and orientation for Staff (Paid and Unpaid)</p>		

Standard(s) Based Questions	Why it is Important	Performance Indicators
<p>PD4: Does the institution have an Institutional Exhibit Plan (Appendix 1)?</p> <p><i>Associated Saskatchewan Museums Standard(s): A53</i></p>	<p>An Institutional Exhibit Plan (Appendix 1) ensures that exhibits are relevant to the museum's mission and shows what human and financial resources will be required to produce them.</p>	<p><u>Gold:</u></p> <p><input type="checkbox"/> The institution has a Board-approved three-to five-year Institutional Exhibit Plan (Appendix 1).</p>
		<p><u>Silver:</u></p> <p><input type="checkbox"/> The institution has an exhibit plan (Appendix 1) but the planning horizon is one year or less.</p>
		<p><u>Bronze:</u></p> <p><input type="checkbox"/> The institution does not have a plan for its exhibits and develops them on a one-off basis.</p>

How to Improve/Maintain	Date Completed	Notes
<p><u>Maintain Gold:</u></p> <p>Carry out a Board/Staff (Paid and Unpaid) planning exercise each year to review the Institutional Exhibit Plan (Appendix 1) and advance the end date by an additional year.</p>		
<p><u>Graduate to Gold</u></p> <p>Submit the Institutional Exhibit Plan (Appendix 1) to the approvers identified in the document. If necessary, hold orientation/education sessions with Board and Staff (paid and unpaid) to ensure that everyone is on board before the plan is brought forward for approval.</p>		
<p><u>Graduate to Silver:</u></p> <p>Prepare an Institutional Exhibit Plan (Appendix 1).</p>		

Standard(s) Based Questions	Why it is Important	Performance Indicators
<p>PD5: Does the institution integrate its publications and communications with the planning and development of exhibits?</p> <p><i>Associated Saskatchewan Museums Standard(s): A82</i></p>	<p>Exhibits and related programs are a key component of a museum's public image and should reflect positively on the institution.</p> <p>Exhibits and related programs must be integrated with all of the museum's communications products in order to be effectively marketed.</p>	<p><u>Gold:</u></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> The institution has a marketing and communications plan that includes exhibits and exhibit-related publications and programming.</li> <li><input type="checkbox"/> Marketing begins well before the exhibit opens.</li> </ul>
		<p><u>Silver:</u></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> The institution integrates exhibit-related publications and communications into its overall marketing and communications planning.</li> <li><input type="checkbox"/> The institution develops exhibit-related communication products such as catalogues, blog entries and web content.</li> </ul>
		<p><u>Bronze:</u></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> The institution does not coordinate or integrate exhibits and related publications into its communications plan.</li> </ul>



How to Improve/Maintain	Date Completed	Notes
<p><u>Maintain Gold:</u></p> <p>Planning for the marketing and communication of exhibits is fully integrated with the development of the exhibits themselves.</p>		
<p><u>Graduate to Gold</u></p> <p>Opportunities for marketing exhibits and for the creation of exhibit-related products are identified during the development of exhibits.</p>		
<p><u>Graduate to Silver:</u></p> <p>The Institutional Exhibit Plan (Appendix 1) should be shared with, and ideally developed with, Staff (paid and unpaid) responsible for marketing and communications.</p>		



## Virtual Exhibit Standards

Virtual exhibits have come a long way since the Museum of the History of Science, Oxford launched what is generally acknowledged to be the first-ever one in 1995. You can still see it at <http://www.mhs.ox.ac.uk/measurer/text/title.htm>.

Virtual, or online, exhibits are an excellent way for Canadian museums to overcome the challenges of a large and, outside major cities, often sparsely-populated country and take their collections to a much wider audience than would be able to visit in person. While having your collections online offers more access than if they are only available by appointment in your storage area, there is much more you can do beyond posting thumbnail photos of artifacts. The web offers rich opportunities for access, engagement and participation. In some cases, this offers an alternate means of access for those who cannot visit your museum in person, but there are also opportunities for visitor experiences that are unique to the online environment.

### **Tips and Hints:**

- Before you begin working on a virtual exhibit, get to know the online environment and see for yourself what works and what does not.
- Have a look at what other museums, galleries and archives are doing and make lists of sites that you think are and are not worth emulating.
- Online exhibits are just as much, and sometimes more work as brick-and-mortar exhibits. Use the same procedures to develop them as you would for physical exhibits at your museum.
- Consider making your museum's online presence more conversational by accompanying your virtual exhibits with a blog, or even starting with the blog and adding the exhibits later. Use the blog to let everyone associated with your museum have a voice and share their thoughts and ideas, from the front desk to the corner office.
- Create a story by blogging about an exhibit (either bricks-and-mortar or virtual) while it is being created as well as after it is open. You can also share these behind the scenes moments on social media as a way to engage audiences and promote upcoming exhibits.
- Use participation in a larger program such as the Virtual Museum of Canada (<http://www.virtualmuseum.ca/home/>) as a stepping stone to setting up your own virtual exhibits.
- Use your Social Media presence (Facebook, Twitter, Instagram) to promote and share your online exhibits.

Standard(s) Based Questions	Why it is Important	Performance Indicators
<p>V1: Does the institution have virtual exhibits, either of its own or through participation in a program such as the Virtual Museum of Canada/Social Media/Website?</p> <p><i>Associated Saskatchewan Museums Standard(s): A54, A55, A56</i></p>	<p>Virtual exhibits are important way to reach the large public; introducing them to your museum and your collection.</p>	<p><u>Gold:</u></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> The institution has its own domain name and URL and a dedicated website, or a distinct presence on a shared website or portal that visitors can find by entering obvious search terms such as the institution's name.</li> </ul>
		<p><u>Silver:</u></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> The institution's online presence provides some programming content beyond basic information about location, admission prices and hours of service.</li> </ul>
		<p><u>Bronze:</u></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> The institution does not have an online presence beyond a basic directory-style listing which can be found by a search engine.</li> </ul>

How to Improve/Maintain	Date Completed	Notes
<p><u>Maintain Gold:</u></p> <p>Use the museum's online presence to engage with visitors through blogging, webinars and social media.</p>		
<p><u>Graduate to Gold</u></p> <p>Begin to develop an online presence for the museum. Research what other museums have done online.</p> <p>Explore ways that visitors could interact with the museum online that may not be possible in the actual building, such as selecting artifacts and "curating" their own exhibit, including comments about why they chose the artifacts they did.</p>		
<p><u>Graduate to Silver:</u></p> <p>Register a domain name and URL and create a dedicated website for the museum, or a distinct presence on a shared website or portal that visitors can find by entering obvious search terms such as the institution's name.</p>		

Standard(s) Based Questions	Why it is Important	Performance Indicators
<p>V2: Does the institution involve participants beyond the institution's board, staff and volunteers in the development of virtual exhibits?</p> <p><i>Associated Saskatchewan Museums Standard(s): A8, A9, A10, A42, A43</i></p>	<p>Virtual exhibits should be developed on the same community engagement model as physical exhibits. (See Standards-Based Questions G2, G4 and EG6)</p>	<p><u>Gold:</u></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> The institution offers opportunities for co-curation with communities outside its walls when developing exhibits and programs.</li> </ul>
		<p><u>Silver:</u></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> The institution engages with communities outside its walls when developing programs and exhibits and takes external perspectives into account.</li> </ul>
		<p><u>Bronze:</u></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> The institution does not engage with communities outside its walls when developing programs and exhibits.</li> </ul>

How to Improve/Maintain	Date Completed	Notes
<p><u>Maintain Gold:</u></p> <p>Use the results of engagement and consultation and offer opportunities for others to co-create and co-curate exhibits with the museum.</p>		
<p><u>Graduate to Gold</u></p> <p>Develop an engagement strategy and use it to identify relevant issues and concerns.</p>		
<p><u>Graduate to Silver:</u></p> <p>Identify external communities with which the museum could be and/or should be engaged.</p> <p>Review the ways in which the museum could engage with these communities through consultation and through seeking out best practices and examples from other institutions.</p>		

Standard(s) Based Questions	Why it is Important	Performance Indicators
<p>V3: If the institution offers virtual exhibits, do they go beyond simple descriptive presentations of artifact images and take full advantage of what can be done online?</p> <p><i>Associated Saskatchewan Museums Standard(s): A57</i></p>	<p>While having your collections online offers more access than if they are only available by appointment in your storage area, there is much more you can do beyond posting thumbnail photos of artifacts.</p> <p>The web offers many opportunities for access, engagement and participation.</p>	<p><u>Gold:</u></p> <p><input type="checkbox"/> The institution offers virtual exhibits that offer a range of ways to participate and engage.</p>
		<p><u>Silver:</u></p> <p><input type="checkbox"/> The institution offers virtual exhibits with some opportunities for interaction. Examples: Object of the Week, Throwback Thursdays</p>
		<p><u>Bronze:</u></p> <p><input type="checkbox"/> The institution does not offer virtual exhibits.</p>



How to Improve/Maintain	Date Completed	Notes
<p><u>Maintain Gold:</u></p> <p>Continue to refresh the museum's online presence and keep up to date with larger trends in online experiences.</p>		
<p><u>Graduate to Gold</u></p> <p>Develop virtual exhibits that offer visitors the opportunity to participate and engage through making selections and sharing user-generated content related to the museum's collections and mission. Example: Sharing stories, responding to contact, helping with identification.</p>		
<p><u>Graduate to Silver:</u></p> <p>Establish a virtual exhibit on the museum's own website or through a program such as the Virtual Museum of Canada or Social Media or Website.</p>		



## Exhibit Evaluation Standards

How well do you know the people who visit your museum? What are their motivations for visiting? What was the main influence on their decision to visit? Who did they come with? Where did they come from? How long did they stay in your exhibit? What parts of the exhibit did they engage with? Was their experience meaningful to them? What did they take away from it? Will they tell others about their experience? If so, what will they say? Will they return for another visit? How many visitors have you had this week, this month, this season or this year? What were the peak days? What were the slow days?

If you have ever tried to answer these questions, you have carried out an evaluation. If you have ever wondered about these questions, or been asked for this information, then you should undertake an evaluation.

### **Tips and Hints:**

- Evaluations can occur before, during and after an exhibit project.
- Evaluations can be as simple as recording how many visitors came to the exhibit, and when, or as complex as carrying out interviews with visitors about their experiences.
- In order to make it worth your while to carry out an exhibit evaluation, your museum should be committed to learning from the results, even if they are negative.
- The results of each evaluation can be incorporated into planning for your next exhibit.

Standard(s) Based Questions	Why it is Important	Performance Indicators
<p>E1: Does the institution conduct evaluations before, during and after the development of an exhibit?</p> <p><i>Associated Saskatchewan Museums Standard(s): A47, A59, A60</i></p>	<p>Without conducting one or more evaluations, you cannot know whether, and how well, the exhibit achieved the goals that were set for it.</p>	<p><u>Gold:</u></p> <p><input type="checkbox"/> The institution regularly carries out a range of types of evaluation of its exhibits and related programs and incorporates the results of the evaluations, whether positive or negative, in planning for subsequent projects.</p>
		<p><u>Silver:</u></p> <p><input type="checkbox"/> The institution regularly carries out at least one type of evaluation for each of its exhibits and related programs.</p>
		<p><u>Bronze:</u></p> <p><input type="checkbox"/> The institution does not evaluate its exhibits or related programs.</p>

How to Improve/Maintain	Date Completed	Notes
<p><u>Maintain Gold:</u></p> <p>Prepare an evaluation plan for a new exhibit project using at least three types of evaluation chosen from:</p> <ul style="list-style-type: none"> <li>- <i>Front end</i> (Beginning of the Project)</li> <li>- <i>Formative</i> (As the project progresses)</li> <li>- <i>Remedial</i> (Once the exhibit is open; troubleshooting and improving)</li> <li>- <i>Summative</i> (Once the exhibit has closed; Reflection and how to improve for next time)</li> </ul> <p>Carry out a training session for Staff (paid and unpaid) about how the evaluations were carried out.</p>		
<p><u>Graduate to Gold</u></p> <p>Prepare an evaluation plan for a new exhibit project using at least one type of evaluation chosen from: Front end, Formative, Remedial or Summative. (Defined in Gold)</p> <p>Carry out a training session for Staff (paid and unpaid) about how the evaluation was carried out.</p> <p>Incorporate the results of the evaluation into planning for the next exhibit.</p>		
<p><u>Graduate to Silver:</u></p> <p>Research the relevant professional literature to understand what evaluation means museum exhibits, add relevant reference materials to the museum's library and carry out training and orientation for Staff (Paid and Unpaid).</p>		

Standard(s) Based Questions	Why it is Important	Performance Indicators
<p>E2: If the institution conducts evaluations, do they make use of more than one research method to gather data?</p> <p><i>Associated Saskatchewan Museums Standard(s): A61</i></p>	<p>Each combination of exhibit and audience can require the use of one or more different research methods.</p>	<p><u>Gold:</u></p> <p><input type="checkbox"/> The institution selects the most appropriate type or types of research methods for the particular exhibit being evaluated.</p>
		<p><u>Silver:</u></p> <p><input type="checkbox"/> The institution has developed the skills and knowledge to use more than one type of research method.</p>
		<p><u>Bronze:</u></p> <p><input type="checkbox"/> The institution does not evaluate its exhibits.</p>

How to Improve/Maintain	Date Completed	Notes
<p><u>Maintain Gold:</u></p> <p>Build institutional knowledge and capacity to deploy a range of research methods during exhibit evaluations.</p>		
<p><u>Graduate to Gold</u></p> <p>Select an exhibit project and determine how it could be evaluated using at least two different research methods.</p>		
<p><u>Graduate to Silver:</u></p> <p>Research the relevant professional literature to understand what evaluation means for museum exhibits, add relevant reference materials to the museum's library and carry out training and orientation for Staff (Paid and Unpaid)</p>		

Standard(s) Based Questions	Why it is Important	Performance Indicators
<p>E3: Does the institution incorporate both the positive and negative results of exhibit evaluations into subsequent projects?</p> <p><i>Associated Saskatchewan Museums Standard(s): A61</i></p>	<p>Evaluations provide useful information. Whether the exhibit was successful or not, information from the evaluation should be incorporated into future projects.</p>	<p><u>Gold:</u></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> The institution has a formal process for reviewing and sharing the results of exhibit evaluations and ensuring that the information is incorporated into future projects.</li> </ul>
		<p><u>Silver:</u></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> The institution informally shares and discusses the results of exhibit evaluations.</li> </ul>
		<p><u>Bronze:</u></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> The institution carries out evaluations but does not systematically make use of the results.</li> </ul>



How to Improve/Maintain	Date Completed	Notes
<p><u>Maintain Gold:</u></p> <p>Consider sharing the results of exhibit evaluations beyond the museum by publishing, presenting at conferences or putting them online.</p>		
<p><u>Graduate to Gold</u></p> <p>Ensure that the results of exhibit evaluations are documented, shared and taken into consideration when planning future exhibit projects.</p>		
<p><u>Graduate to Silver:</u></p> <p>Ensure that the results of exhibit evaluations are documented and shared.</p>		



## **Exhibit Programming & Communication Standards**

At their core, exhibits are about communication. This communication takes place between the museum and visitors, between visitors and artifacts, between visitors and visitors and between the museum and the world outside its walls. Clear objectives, carefully-chosen methods and evaluation of the results are required for communication to be effective.

The educational and public programs associated with exhibits are not an afterthought. They are much more than a simply a children's activity to be created by educators after the curators and designers have done their work. Programs are an essential part of an exhibit's communication with its audience and their planning, development, implementation and evaluation should be integrated into the exhibit development process.

### **Tips and Hints:**

- Educators and programmers should be part of the exhibit team from the beginning of the project.
- Invite your educational community to "test" out your programming before opening to fix problems before you open your programming to a larger audience.
- Have them participate in the program and then carry out an evaluation afterwards. If possible, set up one evaluation session for the students and another for their teachers and group leaders.

Standard(s) Based Questions	Why it is Important	Performance Indicators
<p>PC1: Does the institution make the development of educational and public programming part of the exhibit development process?</p> <p><i>Associated Saskatchewan Museums Standard(s): A67</i></p>	<p>The educational and public programs associated with exhibits are not an afterthought.</p> <p>Programs are an essential part of an exhibit's communication with its audience. Planning, development, implementation and evaluation should be integrated into the exhibit development process.</p>	<p><u>Gold:</u></p> <p><input type="checkbox"/> The institution requires that education and program staff participate in the planning of an exhibit project from the beginning of the process.</p>
		<p><u>Silver:</u></p> <p><input type="checkbox"/> The institution brings education and program staff into the exhibit development process at some point.</p>
		<p><u>Bronze:</u></p> <p><input type="checkbox"/> The institution does not make the development of educational and public programming for the exhibit part of the exhibit development process.</p>

How to Improve/Maintain	Date Completed	Notes
<u>Maintain Gold:</u>  Encourage education and exhibit staff (paid and unpaid) to not only participate in exhibit development but also to come up with exhibit ideas.		
<u>Graduate to Gold</u>  Seek to make educational and public programming an integral part of your exhibits. Think of programs as more than activities for children.		
<u>Graduate to Silver:</u>  Provide an orientation to the institution's exhibit development process to education and program staff (paid and unpaid) and include them in exhibit development.		

Standard(s) Based Questions	Why it is Important	Performance Indicators
<p>PC2: Does the institution utilize a variety of methods of communication to share content?</p> <p><i>Associated Saskatchewan Museums Standard(s):</i> B4, D1, D6, D8</p>	<p>Museums should take full advantage of new and evolving ways of communicating with their audiences.</p>	<p><u>Gold:</u></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> The institution has a comprehensive communications plan that makes effective use of the strengths and capacities of a variety of digital and traditional communications methods.</li> </ul>
		<p><u>Silver:</u></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> The institution explores a wide range of digital communication methods to see how it can use them to communicate with its audiences.</li> </ul>
		<p><u>Bronze:</u></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> The institution only utilizes traditional communications methods such as print, word of mouth and radio to communicate with its audiences.</li> </ul>

How to Improve/Maintain	Date Completed	Notes
<p><u>Maintain Gold:</u></p> <p>Use all available communications channels to promote the museum's exhibits and programs and engage its audiences.</p>		
<p><u>Graduate to Gold</u></p> <p>Develop a communications plan that makes effective use of a variety of digital and traditional communications methods.</p>		
<p><u>Graduate to Silver:</u></p> <p>Survey Staff (paid and unpaid) and others involved with the museum to find out who has experience with, and expertise in, various digital communication methods and develop a plan to use their knowledge.</p>		

Standard(s) Based Questions	Why it is Important	Performance Indicators
<p>PC3: Do the institution's retail operations support its institutional mission and collections?</p> <p><i>Associated Saskatchewan Museums Standard(s):</i> M-E16</p>	<p>Retail is an important revenue stream which can also be used to support its mission and overall communication objectives.</p>	<p><u>Gold:</u></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> The institution develops retail products from its collections and features local and community-based merchandise to create a sense of place.</li> </ul>
		<p><u>Silver:</u></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> The institution carefully selects retail merchandise that is relevant to its mission, exhibits and programs.</li> </ul>
		<p><u>Bronze:</u></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> The institution sells mainly retail merchandise that is unrelated to its mission and could be purchased in other stores.</li> </ul>



How to Improve/Maintain	Date Completed	Notes
<p><u>Maintain Gold:</u></p> <p>Work with local artists and artisans to feature their works and products. Let visitors and the community know that the museum is making an effort to source its products locally.</p> <p>Work with curatorial staff to identify items in the collection which could be reproduced for resale.</p>		
<p><u>Graduate to Gold</u></p> <p>Search for retail products that are in some way related to the institution's overall mission and/or specific exhibits or programs.</p>		
<p><u>Graduate to Silver:</u></p> <p>Minimize or discontinue the sale of generic retail products that do not relate to the institution's mission, exhibits or programs.</p>		

Standard(s) Based Questions	Why it is Important	Performance Indicators
<p>PC4: Does the institution support learning before, during and after a visit?</p> <p><i>Associated Saskatchewan Museums Standard(s): A78</i></p>	<p>Meaningful museum experiences begin before visitors and students arrive and continues after they leave.</p>	<p><u>Gold:</u></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> The institution teaches education groups and visitors how to get the most out of their visit, and supports learning outside the walls.</li> </ul>
		<p><u>Silver:</u></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> The institution offers pre- and post-visit information to education groups and visitors.</li> <li><input type="checkbox"/> Where needed, exhibits include orientation materials that support an engaged and positive experience.</li> <li><input type="checkbox"/> Online offerings do not support exhibits and programs.</li> </ul>
		<p><u>Bronze:</u></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> The institution does not offer pre-visit orientation or post-visit activities to education groups.</li> <li><input type="checkbox"/> Exhibits do not include orientation/instructional information as to how they can be most effectively experienced.</li> </ul>

How to Improve/Maintain	Date Completed	Notes
<p><u>Maintain Gold:</u></p> <p>Regularly conduct evaluations with a range of audiences to determine the effectiveness of the approach.</p>		
<p><u>Graduate to Gold</u></p> <p>Make an institutional commitment to teaching education groups and visitors how to get the most out of their visit.</p> <p>Support learning outside the walls of the museum.</p> <p>Integrate online offerings with exhibits and programs</p>		
<p><u>Graduate to Silver:</u></p> <p>Develop pre-visit orientation and post-visit activities for education groups.</p> <p>Include orientation/instructional information in exhibits as to how they can be most effectively experienced.</p>		

Standard(s) Based Questions	Why it is Important	Performance Indicators
<p>PC5: Does the institution produce its publications and communications in such a way as to ensure their historical and intellectual integrity and protect its brand and visual identity?</p> <p><i>Associated Saskatchewan Museums Standard(s):</i> A85, M-I11</p>	<p>Museums should develop a distinct brand identity and ensure that it is reinforced by their products and programs.</p>	<p><u>Gold:</u></p> <p><input type="checkbox"/> The institution ensures that all of its public offerings are adhere to a brand and graphic identity standard and support its mission.</p>
		<p><u>Silver:</u></p> <p><input type="checkbox"/> The institution has developed a brand identity, including graphic standards.</p>
		<p><u>Bronze:</u></p> <p><input type="checkbox"/> The institution has not formulated a brand identity.</p>

How to Improve/Maintain	Date Completed	Notes
<p><u>Maintain Gold:</u></p> <p>Exercise careful editorial control over the use of the brand and the graphic identity of products.</p>		
<p><u>Graduate to Gold</u></p> <p>Use the results of the branding exercise to develop a brand and a graphic identity.</p> <p>Exercise careful editorial control over the use of the brand and the graphic identity of products.</p> <p>Ensure that logos, wordmarks and domain names are registered and that registrations do not lapse.</p>		
<p><u>Graduate to Silver:</u></p> <p>Carry out a branding exercise to identify the distinct features, identities and competencies of the institution.</p>		

Standard(s) Based Questions	Why it is Important	Performance Indicators
<p>PC6: Do the institution's physical facilities support a comfortable and accessible visitor experience?</p> <p><i>Associated Saskatchewan Museums Standard(s):</i> M-G9, C-B60</p>	<p>The quality of the visitor experience will be adversely affected by poorly-maintained, unsafe or unclean physical facilities.</p>	<p><u>Gold:</u></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> The institution responds quickly and effectively to issues that adversely affect the visitor experience.</li> </ul>
		<p><u>Silver:</u></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> The institution regularly inspects its physical facilities to identify issues which could adversely affect the visitor experience.</li> <li><input type="checkbox"/> The institution utilizes schedules, checklists and preventive maintenance to ensure that its facilities are up to standard.</li> </ul>
		<p><u>Bronze:</u></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> The institution does not regularly inspect its physical facilities to identify issues which could adversely affect the visitor experience.</li> </ul>

How to Improve/Maintain	Date Completed	Notes
<p><u>Maintain Gold:</u></p> <p>Ensure that Staff (paid and unpaid) understand the importance of quick and effective attention to issues that adversely affect the visitor experience and that they are empowered to take action to correct problems.</p>		
<p><u>Graduate to Gold</u></p> <p>Following the inspection, prepare a list of items that require immediate attention.</p> <p>When the immediate issues have been addressed, develop schedules, checklists and preventive maintenance routines to ensure that facilities are up to standard.</p>		
<p><u>Graduate to Silver:</u></p> <p>Conduct a walkthrough with all Staff (paid and unpaid) to identify issues and areas which could adversely affect the visitor experience.</p>		





## Exhibit Conservation & Maintenance Standards

Exhibits are a means to share your collections and the history they represent with your audience. This is a good thing—in fact, it is why your museum exists. However, your use of artifacts in exhibits must balance the competing concerns of preservation and access.

One way to ensure your collections are preserved forever would be to keep them in a completely dark room where the temperature and humidity never change and no one ever touches anything. Alternatively, the way to ensure that the public has maximum access to your collection would be to open the storage room door, leave the lights on and turn the visitors loose. Obviously, neither one of these scenarios is appropriate or feasible, but they do illustrate the challenges of working with artifacts.

By choosing the most appropriate artifacts to tell your story and displaying them in exhibit furniture that maximizes public access while still preserving them, you can strike a balance. Your institutional exhibit plan (Appendix 1) should also take into account the length of your exhibits.

Exhibits can be longer or shorter-term, but the old method of a “permanent exhibit” is no longer an acceptable practice. It is bad for the artifacts because it subjects them potentially adverse environmental conditions through prolonged exposure. In addition, it is bad for the institution and visitors because your museum will be seen as a place where nothing ever changes, and visitors will have little incentive to return.

A program of changing exhibits that are well-maintained is the best way to position your museum as a “must-see” place to visit.

### **Tips and Hints:**

- Plan exhibits to minimize adverse environmental impacts.
- If you must have an exhibit on display for longer than two years, consider rotating artifacts to minimize wear and tear.
- If you cannot establish the ideal environmental conditions in your galleries, upgrade the quality and integrity of your display cases so that the immediate environment around the objects is more suitable.
- If visitors will have an opportunity to use and handle artifacts in the exhibit, ensure the safety of both visitors and objects.

Standard(s) Based Questions	Why it is Important	Performance Indicators
<p>CM1: Does the institution ensure appropriate environmental conditions for its storage and display areas?</p> <p><i>Associated Saskatchewan Museums Standard(s):</i> C-B33, C-B34, C-B37, C-B55, C-B56, C-B57, C-B58, C-B59, C-B70, C-C44</p>	<p>Poor environmental conditions can have severe adverse effects on collections.</p>	<p><u>Gold:</u></p> <p><input type="checkbox"/> The institution has taken whatever steps are feasible to improve the environmental conditions in its storage and display areas, based on the results of its monitoring and established standards and guidelines.</p>
		<p><u>Silver:</u></p> <p><input type="checkbox"/> The institution regularly monitors and documents environmental conditions in its storage areas.</p>
		<p><u>Bronze:</u></p> <p><input type="checkbox"/> The institution does not monitor environmental conditions in its storage and display areas.</p>

How to Improve/Maintain	Date Completed	Notes
<p><u>Maintain Gold:</u></p> <p>Make what improvements are possible, within the limits of the physical spaces themselves and available budget, to improve environmental conditions in storage and display areas.</p> <p>Continue to monitor conditions to determine the effect of the improvements.</p>		
<p><u>Graduate to Gold</u></p> <p>Analyze the results of the monitoring to understand what the conditions are and how they compare to established standards and guidelines.</p> <p>Research ways of improving environmental conditions in storage and display areas.</p>		
<p><u>Graduate to Silver:</u></p> <p>Purchase/borrow equipment and begin monitoring and documenting environmental conditions in storage and display areas.</p>		

Standard(s) Based Questions	Why it is Important	Performance Indicators
<p>CM2: Does the institution ensure that appropriate procedures are followed when exhibits are cleaned and maintained?</p> <p><i>Associated Saskatchewan Museums Standard(s):</i> C-B 46, C-B51, C-B52, C-B53, C-B54</p>	<p>Artifacts can easily be damaged by well-intentioned but inappropriate cleaning and maintenance activities.</p>	<p><u>Gold:</u></p> <p><input type="checkbox"/> The institution regularly monitors the condition of exhibits and artifacts to ensure that they are not being adversely affected by cleaning and maintenance activities.</p>
		<p><u>Silver:</u></p> <p><input type="checkbox"/> The institution has approved, written cleaning and maintenance procedures and staff have been trained and oriented in their use.</p>
		<p><u>Bronze:</u></p> <p><input type="checkbox"/> The institution does not have approved, written cleaning and maintenance procedures for exhibit areas.</p>

How to Improve/Maintain	Date Completed	Notes
<p><u>Maintain Gold:</u></p> <p>The institution regularly monitors the condition of exhibits and artifacts to ensure that they are not being adversely affected by cleaning and maintenance activities.</p>		
<p><u>Graduate to Gold</u></p> <p>Staff (paid and unpaid) receive training in the approved cleaning and maintenance procedures and products for use with exhibits.</p>		
<p><u>Graduate to Silver:</u></p> <p>Knowledgeable staff (paid or unpaid) and/or outside consultants develop and document appropriate cleaning and maintenance procedures for exhibits and review and approve all products and equipment to be used.</p>		

Standard(s) Based Questions	Why it is Important	Performance Indicators
<p>CM3: Does the institution ensure that personnel responsible for exhibit cleaning and maintenance have received appropriate training?</p> <p><i>Associated Saskatchewan Museums Standard(s):</i> C-B51, CB-54</p>	<p>Cleaning and maintenance procedures will not be effective unless Staff (paid and unpaid) receive appropriate training.</p>	<p><u>Gold:</u></p> <p><input type="checkbox"/> The institution keeps records of Staff (paid and unpaid) training and schedule refreshers and upgrades as needed.</p>
		<p><u>Silver:</u></p> <p><input type="checkbox"/> The institution ensures that existing Staff (paid and unpaid) receive training to bring them up to standard and that new Staff (paid and unpaid) receive orientation and training when they start.</p>
		<p><u>Bronze:</u></p> <p><input type="checkbox"/> The institution does not train staff in approved cleaning and maintenance procedures for exhibits.</p>

How to Improve/Maintain	Date Completed	Notes
<u>Maintain Gold:</u>  Ensure that training is kept up to date.		
<u>Graduate to Gold</u>  Ensure that training is documented.		
<u>Graduate to Silver:</u>  Train Staff (paid and unpaid) in approved cleaning and maintenance procedures.		

Standard(s) Based Questions	Why it is Important	Performance Indicators
<p>CM4: Does the institution ensure that exhibits are regularly cleaned and maintained?</p> <p><i>Associated Saskatchewan Museums Standard(s):</i> C-B50, C-B61</p>	<p>If exhibits are not regularly cleaned and maintained they can become unsightly and potentially unsafe and artifacts can also be damages.</p>	<p><u>Gold:</u></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> The institution regularly cleans and maintains its exhibits and keeps record of what was done, and when, and by whom.</li> <li><input type="checkbox"/> Maintenance issues are promptly identified and dealt with.</li> </ul>
		<p><u>Silver:</u></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> The institution regularly cleans and maintains its exhibits, when seasonally appropriate.</li> </ul>
		<p><u>Bronze:</u></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> The institution does not regularly clean and maintain its exhibits, when seasonally appropriate.</li> </ul>



How to Improve/Maintain	Date Completed	Notes
<p><u>Maintain Gold:</u></p> <p>Regularly inspect the cleaning and maintenance of exhibits to make sure that procedures are being adhered to and standards met.</p>		
<p><u>Graduate to Gold</u></p> <p>Train Staff (paid and unpaid) in approved cleaning and maintenance procedures and provide the tools and equipment required to carry out the work.</p>		
<p><u>Graduate to Silver:</u></p> <p>Develop a schedule for exhibit cleaning and maintenance.</p>		

Standard(s) Based Questions	Why it is Important	Performance Indicators
<p>CM5: Does the institution ensure the security of artifacts on display?</p> <p><i>Associated Saskatchewan Museums Standard(s): C-B62</i></p>	<p>The institution should take every feasible measure to minimize the risks to which artifacts are exposed when on display.</p>	<p><u>Gold:</u></p> <p><input type="checkbox"/> The institution only uses exhibit cases with high-quality locks and security measures.</p>
		<p><u>Silver:</u></p> <p><input type="checkbox"/> The institution secures its exhibit cases in such a way as to at least delay or deter an attempt at theft or vandalism.</p>
		<p><u>Bronze:</u></p> <p><input type="checkbox"/> The institution does not lock or otherwise secure its exhibit cases.</p>

How to Improve/Maintain	Date Completed	Notes
<p><u>Maintain Gold:</u></p> <p>Construct and/or purchase high-quality exhibit cases that can be properly secured with locks and/or security hardware.</p>		
<p><u>Graduate to Gold</u></p> <p>Modify and retrofit existing cases to improve their security.</p>		
<p><u>Graduate to Silver:</u></p> <p>Carry out a risk assessment of current exhibit cases to identify weaknesses and opportunities for improvement.</p>		

Standard(s) Based Questions	Why it is Important	Performance Indicators
<p>CM6: Does the institution display artifacts in such a way as to ensure an appropriate balance between the competing demands of access and preservation?</p> <p><i>Associated Saskatchewan Museums Standard(s):</i> C-B63, C-B64, C-B65, C-B67</p>	<p>If there is no access to collections the museum will not fulfill its mission, but neither will it do so if collections are damaged or destroyed while being used in exhibits.</p>	<p><u>Gold:</u></p> <p><input type="checkbox"/> The institution, where possible, considers alternatives, such as the creation of replicas or frequent rotation of display.</p>
		<p><u>Silver:</u></p> <p><input type="checkbox"/> The institution selects artifacts for exhibits so as to balance, to the extent possible, the competing demands of access and preservation.</p>
		<p><u>Bronze:</u></p> <p><input type="checkbox"/> The institution does not attempt to balance the competing demands of access and preservation when developing exhibits.</p>

How to Improve/Maintain	Date Completed	Notes
<p><u>Maintain Gold:</u></p> <p>Where resources permit, alternatives to the display of problematic artifacts such as the creation of replicas or the use of video are considered.</p>		
<p><u>Graduate to Gold</u></p> <p>If there is no alternative to the use of an artifact, risks are mitigated through exhibit furniture and/or environmental adjustments such as intermittent lighting.</p>		
<p><u>Graduate to Silver:</u></p> <p>From the preparation of the brief, through to the development of the exhibit, the institution takes what steps it can to ensure a balance between preservation and access.</p>		

Standard(s) Based Questions	Why it is Important	Performance Indicators
<p>CM7: Does the institution conduct risk assessments before using artifacts such as historical machinery?</p> <p><i>Associated Saskatchewan Museums Standard(s): C-B66</i></p>	<p>The exhibit experience should be safe for both visitors and the artifacts on display.</p>	<p><u>Gold:</u></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> The institution identifies high-risk activities and exhibits and limits its exposure through training and risk management procedures.</li> </ul>
		<p><u>Silver:</u></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> The institution carries out risk assessments before using artifacts such as historical machinery.</li> </ul>
		<p><u>Bronze:</u></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> The institution does not carry out risk assessments before using artifacts such as historical machinery.</li> </ul>

How to Improve/Maintain	Date Completed	Notes
<p><u>Maintain Gold:</u></p> <p>Regularly monitor both the condition of the machinery and the training and work of Staff (paid and unpaid) associated with high-risk exhibits to ensure safety.</p>		
<p><u>Graduate to Gold</u></p> <p>Develop procedures to minimize the risk.</p> <p>Consult with a professional risk manager or the institution's insurer.</p>		
<p><u>Graduate to Silver:</u></p> <p>Identify exhibits such as historical machinery that pose a risk.</p>		

Standard(s) Based Questions	Why it is Important	Performance Indicators
<p>CM8: Does the institution minimize the exposure of artifacts to damage through use or demonstration?</p> <p><i>Associated Saskatchewan Museums Standard(s):</i> C-B68, C-B69</p>	<p>If there is no access to collections the museum will not fulfill its mission, but neither will it do so if collections are damaged or destroyed while being used.</p>	<p><u>Gold:</u></p> <p><input type="checkbox"/> The institution minimizes the use of original artifacts by providing alternate means of experience, such as video or simulation, or through the construction of historically accurate replicas.</p>
		<p><u>Silver:</u></p> <p><input type="checkbox"/> The institution uses original artifacts but only where alternatives have been carefully considered and the use of original artifacts has been approved as the best available solution.</p>
		<p><u>Bronze:</u></p> <p><input type="checkbox"/> The institution regularly uses original artifacts, without considering alternatives first.</p>



How to Improve/Maintain	Date Completed	Notes
<p><u>Maintain Gold:</u></p> <p>Where original artifacts are being used, provide appropriate maintenance and repair and carefully monitor their condition, discontinuing use if it becomes unsustainable.</p>		
<p><u>Graduate to Gold</u></p> <p>Minimize the use of original artifacts by providing alternate means of experience, such as video or simulation, or through the construction of historically accurate replicas.</p>		
<p><u>Graduate to Silver:</u></p> <p>Carefully consider the use of original artifacts to ensure that there are no viable alternatives.</p>		

## Further Resources

### Websites:

Canadian Museums Association. "A Sustainable Development Guide for Canada's Museums. [http://www.museums.ca/document/1140/0\\_TableofContents.pdf](http://www.museums.ca/document/1140/0_TableofContents.pdf)

Learn Alberta. "Designing an Exhibit."  
<http://www.learnalberta.ca/content/ssmt/html/docs/designinganexhibit.pdf>. 2016.

### Blogs

Design Shop. "10 Tips for Museums Exhibit Design Success."  
<http://www.teamdesignshop.com/blog/2014-01-23-10-tips-museum-exhibit-design-success>. 2017.

Eastern Illinois University. "Thinking about History Exhibits."  
<https://eiuhistoryexhibits.wordpress.com>. 2016.

"ExhibiTricks: A Museum/Exhibit/Design Blog." <http://blog.orselli.net>. 2016

Image Craft Exhibits. "Museum Exhibit Design Tips."  
<http://www.imagecraftexhibits.com/museum-exhibit-design-tips/>. November 6, 2015.

"Museum Planner." <https://museumplanner.org>. 2017.

"The Exhibit Designer." <https://theexhibitdesigner.com>. 2017.

### Books:

Allen, Sue and Joshua Gutwill. "Group Inquiry at Science Museum Exhibits: Getting Visitors to ask Juicy Questions." Routledge. 2010.

Bedford, Leslie. "Art of Museum Exhibitions, The - How Story and Imagination Create Aesthetic Experiences" Routledge. 2014.

Caulton, Tim. "Hands-On Exhibitions: Managing Interactive Museums and Science Centers." Routledge. 1998.

Kennedy, Jeff. "User Friendly: Hands-On Exhibits that Work." Association of Science Technology Center. 1991.

Klein, Larry. "Exhibits: Plan and Design." Alta Mira Press. 1986.

Lord, Barry and Gail Dexter Lord. "The Manual of Museum Exhibitions." AltaMira Press. 2002.

McKenna-Cress, Polly and Janet Kamien. "Creating Exhibitions: Collaboration in the Planning, Development, and Design of Innovative Experiences" Wiley. 2013.

Miles, R.S. "Design of Educational Exhibits." Routledge. 1988.

Neal, Arminta. "Exhibits for Small Museum-A Handbook." American Association for State and Local History. 1976.

Norris, Linda and Rainey Tisdale. "Creativity in Museum Practices." Routledge. 2013.

Ontario Museum Association. "Evaluation of an Exhibit-Community Museums and Travelling Exhibits." 2001 .

Perry, Deborah L. "What Makes Learning Fun? Principles for the Design of Intrinsically Motivated Museum Exhibits." AltaMira Press. 2012.

Serrell, Beverly." Exhibit Labels." Rowman & Little Publishers. 2015.

Serrell, Beverly. "Judging Exhibitions: A Framework for Assessing Excellence." Routledge. 2006.

Simmons, John E. "Things Great and Small: Collections Management Policies." American Alliance of Museums. 2005.

Taylor, Samuel. "Try It! Improving Exhibits Through Formative Evaluation." Association of Science Technology Center. 1991.

Wallace, Margot. "Writing for Museums." Rowman & Littlefield Publishers. 2014.

## Appendix 1 - Institutional Exhibit Plan

In addition to developing a plan for individual exhibits, a museum should have a multi-year institutional exhibit plan. Such a plan, which outlines what exhibits will happen and when, can confirm that exhibit projects are aligned with your institution's mission, mandate, and core documents. An institutional exhibit plan will ensure that your exhibits provide accurate information, are relevant to the community, communicate effectively, provide opportunities for learning, and safely display the artifacts in your collections. The document should include planning for the evaluation of exhibits as well as for inclusivity and accessibility. The creation of an institutional exhibit plan can be divided into three steps.

### Step One: Develop Your Process

In this step, the outline for the plan is developed in such a way as to ensure that it supports broader institutional goals and the processes for creating both the plan and a particular exhibit are defined. Gather and review your core organizational documents and summarize what guidance they provide for exhibit development. Does your institution have some or all of these documents? What do they say that might be relevant to an exhibit plan?

- Mission Statement
- Institutional Vision
- Strategic Plan
- Master Plan
- Collections Plan
- Interpretive Plan
- Interpretation and Education Policy
- Research Policy
- Exhibition Policy

Determine the approving authority for the exhibit plan and map the route to approval. Defining the approval process up front can increase institutional buy-in and avoid unpleasant surprises later on. Who approves what at your institution? Who will approve this plan? What are the stages in getting approval? Who needs to be on board for this to succeed? Who still needs to be convinced?

Recruit the team that will develop the plan, and write a scope of work that defines the overall objective and shows who will do what. Consider including some or all of the following on your team:

- Staff (paid and unpaid)
- Board Members
- Community Members
- Municipal Officials or Politicians

Determine the scope of your exhibits and create an exhibit typology. Individual projects will vary, but it helps to define general categories of size and cost. For your museum, what would be a small, medium or large exhibit in terms of its size, cost and the time required to develop it? In order to develop such a typology, you can use previous exhibits at your own institution to get a sense of typical sizes and complexity, and/or ask other museums what their typical figures are. The typology is only a guideline, but it is useful in determining the scope of projects during the planning process.

Outline the stages in your institution's exhibit development workflow. Depending on the size of your institution, the number of people involved in exhibit development, and the scope of the project, you may have different stages, but generally an exhibit will move through: Concept, Design, Fabrication, Installation and Post-Opening. What are the typical steps in each of these stages for your museum?

### Step Two: Create Your Product

In this step, ideas for exhibits are gathered, evaluated, selected, and detailed. Create an exhibit proposal form that captures the big idea, intended audience, means of expression, learning outcomes, and scope for each exhibit idea. The form you develop should ask for enough detail to understand the proposed exhibit but be general enough to appeal to non-specialists and be written in plain language. The headings should also align with the exhibit brief (Appendix 2) used by your institution.

Gather exhibit ideas using the proposal form. Reach out as far as you can to gather proposals and use the process to broaden your community engagement. If they have not been involved with exhibits before, consider holding a workshop about the exhibit development process to help them create a proposal. Using the proposal form makes exhibit development a true two-way street: the museum is accessible because proposals are welcome, but the proponents must show how the proposed exhibit helps to advance the museum's mission so they are not just tossing in random ideas or pet projects.

Review and rank the proposed exhibit ideas. Evaluate the proposals according to how well they align with the institution's core documents, how well they advance the mission and how feasible they are to carry out. Select exhibit ideas for further development based on their ranking. Using the typology you developed, assign a scope to each exhibit. Develop the selected exhibit proposals by creating a brief and a budget for each one.

### Step Three: Make Your Plan

In this step, the content developed in step two and the process outlined in step one is combined, scheduled and approved. Create an outline schedule that covers the whole term of your plan. Given the lead time required to develop some exhibits, three to five years is a good time frame to use for your plan. This is a high-level schedule so the exhibit projects are only broken down by year and quarter. After the institutional exhibit plan is approved, a more detailed schedule can be prepared for each project. You may wish to align the time frame of your plan with other relevant documents, such as the interval between reviews of your strategic plan or the term of council if you are a municipal museum.

Place your selected exhibits into the schedule using the exhibit development stages as milestones. Review the schedule and adjust as required. Read down the time columns and look for hard spots where projects overlap, conflict, or over-extend your resources. Prepare the plan for approval. A suggested table of contents for an institutional exhibit plan is shown below.

1. Introduction: Provide an executive summary of the plan, including any relevant background information, documents, and previous plans.
2. Core organizational documents: List the core organizational documents that are relevant to the plan and summarize the pertinent section(s) of each. These could include a vision, mission statement, strategic plan, interpretive plan, collections plan, or similar documents.
3. Exhibit vision and statement of creative approach: Outline a broad vision for the character and scope of the exhibits in the plan. What is your institution's "house style" for exhibits? For example, your aim might be to develop travelling exhibits that can be easily set up and taken down by a maximum of two people, are suitable for display in non-traditional exhibit venues, and are secure enough to be left un-attended. Or your exhibits might seek to present the past in the context of the present, linking artifacts and archival materials with

contemporary issues.

4. Exhibit development and approval process: Describe the exhibit development process and when approvals will be given. For example, using the stages in Chapter Three, you might need to seek approval for the brief, schematic design, final design, and budget.
5. Development of this plan: Describe how the plan was initiated and developed, and by whom, and include consultations, focus groups, and surveys.
6. Exhibit typology: What are the size, cost and time to develop of typical exhibits at your museum?
7. Exhibit brief: Outline the structure of the brief you will be using to develop your exhibits.
8. Selection of proposed exhibit topics: Present all of the topics that were proposed during the consultation process and describe the criteria that were used to rank them and make a final selection.
9. Selected exhibits: Provide a brief for each exhibit using the format above.
10. Three-year exhibit schedule

## Appendix 2 - Exhibit Brief

The exhibit brief is one of the most important documents in the exhibit development process. Some are briefer than others, but the purpose is always to deliver a concise overview of the whole project. The brief summarizes only the essential details of the exhibit because each of the aspects that it presents will be outlined in more detail later. The brief will be a touchstone throughout the project, and a copy of it should be brought to every meeting.

The brief is also a sales tool and pitch book that can be used to introduce the project to staff, board, volunteers and funders. Often the language from the brief can be used in a grant application, and it will also form the basis for the request for proposals if any components of the project are being put out to bid. The exhibit brief should address six key aspects of the project: 1) Big Idea; 2) Audience(s); 3) Means of Expression; 4) Visitor Experience; 5) Learning Outcomes; 6) Budget.

### The Big Idea

- What is the title of the exhibit?
- What is the big idea of the exhibit?
- What is the exhibit all about?
- Why is it being created?
- What will it achieve?
- Why should a visitor come to see the exhibit?

### Audience(s)

- What is the primary audience for which the exhibit is intended?
- What are the characteristics of that audience and how will the exhibit address them?
- Are there secondary audiences?
- If so, what are the characteristics of those audiences?

### Means of Expression

- What is the range and nature of the artifacts that will be used?
- Will the exhibit include interactives?
- Will the exhibit include audio?
- Will the exhibit include video?
- Will the exhibit include other elements?



### Visitor Experience

- What are the inspirations for the design of the exhibit?
- What will the exhibit feel like to visit?
- What are the mood, theme and structure of the exhibit experience?
- What will audiences see and do in the exhibit?
- What kinds of programming will be offered in conjunction with the exhibit?
- What is the expectation for average length of stay?

### Learning Outcomes

- What is the expectation for the knowledge and understanding visitors will bring to the exhibit?
- What is the expectation for the knowledge and understanding visitors will take away from the exhibit?
- How will these be measured?

### Budget

- What is the overall budget for the exhibit as a cost per square foot?
- How is that divided amongst all of the exhibit components, including any required capital improvements to the gallery?
- What are the funding sources for the exhibit?

## Appendix 3 - "Lessons Learned" Feedback

Every exhibit development project is an adventure. It is an intense and creative process during which you will work hard, make decisions and put your heart and soul into what you are creating. After the dust settles, it is a good idea to get your team back together and carry out an evaluation.

Develop a form for staff to complete before the meeting and then collate and anonymize the results. You can ask staff to rate the following on a scale of strongly disagree/disagree/neutral/agree/strongly agree/not applicable:

- Project objectives were clear and defined
- My role during the content development stage was clear
- My role during the design stage was clear
- My role during the production & installation stages was clear
- I felt that my ideas were acknowledged throughout the exhibition development process
- I felt informed, as needed, throughout the project
- I could spend enough time working on my deliverables for the project
- I had enough resources to meet my deliverables for the project
- I was involved at the correct times
- Cross-departmental involvement and contributions were adequate
- I was aware of the progress of the project
- I could ask the project manager for help or information throughout the project
- Overall, my work-life balance was not compromised throughout the project.
- The project objective was achieved

With reference to the stages your institution uses to develop exhibits, you can also survey the staff regarding:

- What went well?
- What were some successes?
- What were some challenges during this project?
- What have we learned that can be used for future exhibition development projects?

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