Guiding Principles for the Design of Traveling Exhibitions

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Guiding Principles for the Design of Traveling Exhibitions is a thesis project that involves the process of gathering and organizing the extensive information and experience that the museum industry has to offer when designing traveling exhibitions. By collecting and analyzing information and experiences from museum professionals and existing design practices, this project will organize these shared essential philosophies and best practices into one document. This thesis project is intended to be a dynamic tool used and reevaluated among museum professionals as it evolves into a web based component such as a blog, social network and/or a digital forum.

The ultimate goal of this project is to democratize the existing information for the design of traveling exhibitions into shared resources, offering other groups of smaller or newer institutions information as they enter the arena and business of travelling exhibitions. By diversifying the content and design of travellers, this project offers the potential to evaluate more cost and time efficient solutions.
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My approach for this graduate thesis project is somewhat different than traditional exhibition design projects proposed by my fellow colleagues. Instead, as I began my thesis research, I explored some challenges that the museum industry faces regarding exhibition design. One challenge in particular, emerged from my summer internship with the Cooper-Hewitt National Design Museum, Smithsonian Institution.

In the summer of 2007, I was fortunate enough to participate in the Peter Krueger Summer Internship program at Cooper-Hewitt. It was through my work experience there that my interests in a specific type of exhibition evolved, that of traveling exhibitions. As I worked with the curator of traveling exhibitions over the course of the summer, writing travel proposals and organizing travel checklists, I became increasingly frustrated with what seemed like a somewhat disorganized approach for the design of an exhibition meant to travel. I felt that many of the challenges I faced, could have been thought through already, had someone addressed specific concerns early on in the project. I began to wonder, if I feel this frustrated with the process involved with traveling exhibitions, maybe I’m not the only one.

The Guiding Principles for the Design of Traveling Exhibitions is a graduate thesis project that begins to address some of the challenges I realized when creating and preparing for traveling exhibitions. This document focuses on the process of designing a traveling exhibition, the approach organized into fifteen guiding principles. The guiding principles for this project were collected and categorized through the research I performed with museum professionals having experience in traveling exhibitions. I do not claim to know the rights and wrongs or dos and don’ts of designing traveling exhibitions, and do not propose a “how to” approach from this document. Instead I asked museum professionals what their best practices are for the process of designing traveling exhibitions.
I took the challenge of organizing existing best practices for the design of traveling exhibitions and developing them into key principles. While developing these principles, and researching the many variables of each, I realized that the conversation revolving around the principles was very much alive. I feel that to fully express the many phases and approaches to designing traveling exhibitions, these principles need to exist as living and evolving ideas. The implementation of a blog component is used to not only act as a tool for disseminating my research, but to instigate the conversations and archive these experiences and best practices.

I believe that this thesis project, along with the implementation of a blog to disseminate the guiding principles and continue the discussion, is a true culmination of my studies as a MFA Museum Exhibition Planning and Design graduate candidate. I am proud of the project as a whole and will continue to ensure that the conversations surrounding these fifteen guiding principles will live and evolve as my early contribution to the museum field.
The idea of traveling an exhibition is over 150 years old, originating with one of the leading museums of England, the Victoria and Albert Museum in London. Evolving from a service for art students to eventually serving the general public, an initial prototype was launched in 1850 by the Victoria and Albert Museum with loans of art to the Central School of Design at Somerset House, continuing on for two years (UNESCO, 58).

This method of traveling exhibitions was a presentation of not only visual arts, but architecture, civic planning, scientific discoveries and achievements and the history of different countries. It offered a means of understanding the customs and characters of different people (UNESCO, 59).

The diffusion of knowledge for educational purposes in all fields continues to be effectively accomplished through exhibitions today. Allowing international means of communication, the disappearance of language barriers and the gain of wide public attention has been driving museums to produce traveling exhibitions (UNESCO, 59).

“Exhibits are environments in which individuals learn and experience on many levels, both intellectually and emotionally.” (Edson, 2)

For countries or geographic regions that lack large art collections (or any discipline for that matter), the value of a traveling exhibition is evident. As early as 1944, the director of the National Art Gallery of New South Wales, Sydney, reported pioneer efforts in Australia that had been made with government support to bring exhibitions to remote country centers ‘to diffuse a knowledge of, and interest in, the visual arts, and more particularly the Australian arts as they affect the people’ (UNESCO, 59). For the first three years of this initiative, the exhibition was accommodated in town halls, school assembly rooms, barber shops, restaurants and other available spaces. After five years, plans were underway to build a gallery for traveling exhibitions.
Traveling exhibitions, by their very nature, attract large audiences which cannot always be reached through publications. In the 1960s, Tekniska Museet in Stockholm indicated that its policy is to avoid exhibitions on any subject that can be explained as well or perhaps better than an article or a book (Carmel, 14). At the same time, traveling exhibitions came into being created on two principle reasons: the usefulness of temporary exhibitions to museums; and the educational opportunities offered by a concentrated collection of material on one or more related subjects (UNESCO, 60.) Instead of exhibiting objects with little or no interpretation, museums could use this tool as a way to communicate stories to visitors and create new ways of interpreting and studying collections.

As experiences had evolved over the years, traveling exhibitions were becoming more and more popular, offering not only the chance to disseminate culture, but also to make money and produce income for museums.

The blockbuster exhibition originated in 1976 with the “Treasures of Tutankhamen.” Traveling to six North American museums, with a total of 8 million visitors, the revolution of the blockbuster was a hit to say the least. From that point on, museums have been trying to duplicate that same success, although nothing has come quite that close (Bedno).

It is important to note here that the museums who do choose to try and develop blockbuster exhibitions should keep in mind, aside from financial and visitor gain, a fundamental question: How do you top yourself after a blockbuster? Do blockbusters effect how visitors experience in-house or permanent exhibitions? Do in-house exhibitions staff feel they need to make permanent exhibitions of blockbuster ‘quality’ or numbers? Is this what exhibition needs to become to bring visitor attendance to great heights?

A topic of interest that has stemmed through the research of this project,
deals with the effects of blockbusters on the museum community. How does a city prepare for blockbuster shows? Does tourism soar with blockbusters, therefore bringing the potential for city funding higher than average? Generally, blockbusters are large in square footage, minimizing the available spaces or venues for traveling. Only larger museums with larger capacities could host typical blockbuster exhibitions, therefore omitting many cities off the geographical grid. These questions only begin to address the implications of blockbuster exhibitions.

It needs to be said that although the guiding principles developed within this document do aim to be universal principles for all types and sized museums, concentrating on smaller sized museums or newer institutions, note that blockbuster exhibitions are a beast within themselves. To describe, define and present information and statistics for blockbuster exhibitions would be another project entirely. That said, how have cultural institutions evolved the idea of a blockbuster exhibition into other forms of cultural dissemination?

For the last few decades, the concept of a traveling exhibition has evolved and extended into a number of exhibition varieties or solutions, one being the use of ‘mobile museums’ offering exhibitions out of traveling trailers to schools and other venues. In Berlin, Mobile Museums have become a significant impact for artists, as “they have been created to temporarily occupy already significant urban sites. This phenomenon began in the 1970s and still strives today. A question remains: are mobile museums traveling exhibitions?

It seems that the evolution of traveling exhibitions has been utilized mostly by larger institutions with the resources and capacity to support such events. Traveling exhibitions tend to be large in size and budget, leaving smaller institutions possibly struggling to compete for audience attendance and economical resources. How can traveling exhibitions be a solution not only for larger
institutions to diversify and broaden their audiences, but for smaller and newer institutions to do the same?

Not only are museums trying to produce traveling exhibitions to create revenue, income and audience attendance, specific companies and firms specialize in traveling exhibitions as well. Over the last few decades, companies such as Evergreen Exhibits or Arts and Exhibitions International are producing traveling exhibitions for various cultural institutions around the globe. How do museums compete with for-profit companies who produce traveling exhibitions as purely income?

Although there are a number of reputable resources for understanding best practices of traveling exhibitions, many, if not all, focus on the fabrication and transportation of a traveller. There are multiple guidelines as well for traveling an exhibition, including topics on insurance, budget and installation. The Smithsonian Institution Traveling Exhibition Services and the National Museums of Canada both offer extensive resources and mandates for many of these discussions. It is hoped that the publication and organization of this material will encourage others whose experience has revealed equally effective and satisfactory principles to participate in the online blog that is being created as a continuation of this project. It will act as a basis for further, more complete and more inclusive principles in the traveling museum industry.

Introduction
This thesis project targets those museum professionals, such as developers and designers, to (re)assess their approach to the design of traveling exhibitions. These principles were designed with smaller museums and newer institutions and professionals entering the business of traveling exhibitions in mind. Whatever the scale of the museum, or the reason for creating a traveling exhibition, museum professionals can consider universal design principles to implement more cost effective and dynamic exhibition solutions.

The term “universal” implies that these principles can apply to all museum scales, whether large or small, to as many or as little staff resources and to any budget. This may sound like a tall order. Consider that most existing traveling exhibition guidelines cover the latter phases for the process of fabrication, packing, and insurance methods, to name a few. This document instead supports the process of a traveling exhibition during the early phases of Research/Initial Concept through to the Design/Development phases. Resources for the details of design construction, fabrication, installation and management of traveling exhibitions will be provided at the end of this document, although not explored for the purposes of this thesis project. Instead, these Guiding Principles for the Design of Traveling Exhibitions explores and questions how the concept and story is developed and evolved into a relevant physical visitor experience.

This thesis project is not only a way to share knowledge but to also inform institutional decision makers. How do we, as museum professionals, communicate the import phases of designing traveling exhibitions to colleagues with different perspectives in the profession? This research gives credibility to the challenges and decisions museum professionals need to address when creating traveling exhibitions. This document can act as a tool for communicating and sharing key principles of the design process.

At what process of creating an exhibition should these principles play a role? If
using the example of exhibition phases given in this document, than these principles apply to the Research/Initial Concept phase through to Design/Development (see page 32 for exhibition phases).

During these early phases, museum professionals should think differently when developing stories and visitor experiences for a traveling exhibition, than with an in-house or permanent exhibition. The design of the story and the way it is communicated would need to be considered differently for travellers; the exhibition will be experienced by broad audiences with the possibility of multiple languages for example.

In the last 30-40 years there have been major changes for exhibitions in both the demand placed on museums and in their planning of public exhibitions. “Museums must address questions of social responsibility, respond to economic pressures and commercial competition, and meet its visitor’s desire to have a voice in museum programming” (Bedno).

For museum audiences, it is not enough to know about an artifact, but to understand what that artifact represents, what story it tells. Economically, museums compete with other forms of visitor entertainment, an athletic event for example, causing the pressure to create compelling and interactive environments for visitors as opposed to a “look, do not touch” environment. As not-for-profit institutions, museums need to compete with commercial organizations that could have more resources to fund “bigger and better” exhibitions, causing admissions and membership costs to increase, just to meet an increase in revenue.

The evaluation of audience will naturally affect the character of the exhibition, its quality, size and duration, as well as many aspects of its production and presentation (Carmel, 12). This is a crucial element for museum professionals in these initial phases of design; especially true of traveling exhibitions due to broader audiences across broader geographical locations.

**Principle Audience**
Considering and (re)assessing your design process through these guiding principles can help to refine and resolve long-standing challenges and be a dynamic document to share, add and evolve with your institution.
Thesis Overview
Guiding Principles for the Design of Traveling Exhibitions aims to impact museum professionals who are engaged in or plan to embark on the conceptualizing and designing of traveling exhibitions. By researching and exploring philosophies and best practices for the design and sustainability of traveling exhibitions, these principles are intended to broaden and diversify the creators of a traveling exhibition by sharing already existing successes and pitfalls. Travellers were a way to more broadly disseminate culture and knowledge, and although many stay true to this spirit, they have also evolved into a solution for generating audience attendance and income or be a ‘blockbuster.’

Working with museum professionals to compose practical and experience based guidelines for the design process of traveling exhibitions, this thesis project will take these philosophies and practices to institutions and individuals to apply and adjust, add to and share for their own traveling exhibition projects as a way to make this process that much more efficient. Taking this project one step further will be an evolving and changing blog component for the use of museum professionals, creating an opportunity for shared information, online discussion and professional networking to further enhance and diversify the design of traveling exhibitions and the audience they reach.

Impact Statement
The following three goals solidify and outline the intentions and hopes for this thesis project:

To further organize, document and expand, for the museum field, the philosophies and practices that go into the conceptual design and development process of traveling exhibitions.

To organize a set of guiding principles that will help broaden and diversify the possible creators of traveling exhibitions, ie. small museums, libraries, art galleries, etc.

To create a living, evolving web based discussion for museum professionals in the form of a blog, professional network and/or digital forum.
This thesis project is the guiding principles for the design of traveling exhibitions. The term design is used as a framework for the process of creating a traveling exhibition. In order to thoroughly research for the proposed principles, the design of content development, the design of the layout/exhibit space, the design of educational programs, the design of the fabrication and the design of the marketing strategies has been explored.

For the intent of this thesis project, the design of a traveling exhibition involves a specific purpose, planning and intention that should exist throughout every phase of the process. Although true for all types of exhibitions, having clear intention of design may produce more cost and time efficient traveling exhibitions.

In order to cover all disciplines of the museum industry, research and interviews were conducted with museum professionals from a variety of museum genres: history, art, science, natural history and children’s museums. It is also relevant and necessary to explore commercial design firms who specialize in designing traveling exhibitions for museums and other cultural venues. There may be some interesting cross referencing of methods and philosophies that can be shared with museum institutions from different disciplines and that can help to define and choose which principles prove to be effective for their process.

The first phase of this thesis project consisted of a front end analysis, in the form of a survey and interviews with experienced museum professionals. From there, the project evolves into the collecting, analyzing and synthesizing

Methodology

Design is defined as the purpose, planning, or intention that exists or is thought to exist behind an action, fact, or material object.

- New Oxford American Dictionary
phases of research, in which guiding principles for the design of traveling exhibitions are formed and evolved. Each principle has been explored and formatted into a dynamic set of guiding principles.

As the information was collected and analyzed, common consistencies and inconsistencies with the philosophies and practices of museum institutions and commercial museum design firms and organizations have been addressed and thought through. These results are the first step to creating a publication and online network that will help institutions embarking on the travel exhibition business and perhaps institutions that have been already involved in this work to (re)assess their design process.

Methodology
The Principles
The following section consists of a guiding list of principles researched and organized from the resources of many museum professionals who have experience working with the many design processes of traveling exhibition, at all levels in the industry. Each principle has the potential to evolve, inviting museum professionals to enhance, add and share their own experiences. These principles are in no particular order.
Although every exhibit should have dynamic topics and the ability to draw attention, it is particularly important for “travellers” to possess these features. An exhibit that moves to a number of locations needs to sustain visitor interest for all types of audiences in order to encourage visitor interactions. In terms of marketability, a “traveller” that has a dynamic topic and draws attention will be more desirable to more museums, therefore having the potential to be profitable for any institution that decides to host.

This principle also gives designers and developers the chance to explore topics that their own institutions might not have the capacity to permanently house. An opportunity to partner with other institutions to create an exhibit with more resources may lead to more dynamic topics and therefore draw attention to the exhibit from wider audiences. Speaking to museum professionals, the opportunities to build relationships with larger or smaller institutions seems to be more desirable and successful, allowing the design to evolve with the potential for more resources and fulfillment.

Guiding Principles
VISITORS

Whether a travelling exhibition visits two institutions or ten, visitor usability needs to be evaluated. Does the design of your exhibit allow for large crowds to easily move through the space? Are there components of the exhibit that visitors spend more time with then others? Is your exhibit built to sustain constant visitor and installation wear and tear?

Although not every travelling exhibit is expected to bring in hoards of visitors at one time, some do. Keep in mind the space you have allowed for every element and component of your exhibit, where a visitor(s) will stand, how they will experience one element in relation to another and how they interact with each other, can determine the outcome of their overall experience.

Are there specific elements in a travelling exhibit that require more time for a visitor to experience than another? How will that effect other visitors when that element is occupied? Will it compromise the experience? The installation from venue to venue and the level of popularity along with visitor space needs, should travel along with the exhibition so that the host institution has this knowledge and plan for best case situations.

Relevant for all types of museums such as science, children’s, history and art museums, is the idea of sustainability. When an interactive breaks or wears out, it can be removed from the floor to avoid visitor disappointment or frustration. The same applies when thinking about exhibition elements such as vitrines or graphics. Building the components to last and to be sustainable during travel is of number one importance, but building in for ease of maintenance is just as critical.
MISSION/CULTURE

Taking the time to develop a mission, especially depending on how many voices are involved in the process, can be tiresome but rewarding. Through all phases of research, development and design, it is easy to lose sight of the big idea. Keeping the exhibition’s goals on hand and in mind will help to make the process of design focused and tight. If everyone working on the exhibit is trying to reach the same end goals, decision making should be against clear criteria based on mission.

This could become useful when communicating the design and the topic of the exhibition to potential venues and fabricators. Once everyone understands what the mission is, confusion can be avoided during any collaborative process. Fabricators will understand how the designs should function to match the mission and how visitors will understand the space and the big ideas. The same is true for educators and marketers. Anyone who is working collaboratively on the exhibition should be aware of the exhibition’s mission and goals to ensure the success for every phase.

Also consider the culture of your institution when referring back to mission and translating your design ideas. How your institution approaches an idea may be quite different than how a venue may approach the same idea. Keep in mind that although you and your colleagues may understand the approaches you take in the designs you produce, those outside the culture of your institution may not understand. Always remember to communicate the mission in a way for all to understand the intentions for the end result, the exhibition.

Guiding Principles
There is nothing worse than being really excited for a traveling show to visit a city nearest you, seeing great commercials and advertisements everywhere and then being disappointed by the actuality. Sometimes seeing a specific object can make or break the show, or learning something new that you would have never imagined. Visitor satisfaction and expectations can be explored with pre-tests and front-end evaluations performed on a national and international scale.

Successful “travellers” also may need to incorporate and implement relevant digital content, digital design and visitor expectations. With so many advances in materials and technological applications, designers have the ability to create applications in their exhibits that bring out social, community and cultural relevance. The tricky part to this is establishing a new design that works with the content to create a seamless exhibit. If podcasts are all the rage right now, how can that type of application work with your exhibit? A podcast should not be used for the sake of keeping up with the times, nor should cell phone tours which have become a significant trend with museum interpretation. These devices should have relevance to the way you want to communicate your exhibition. Perhaps it just isn’t the right tool. Instead, explore and create your own tools!
This can all be explored through market research and front-end evaluations. Prototyping ideas and exhibition elements will give designers a better understanding of what their audiences expect and understand. Especially true for travelling exhibits, audiences will vary significantly. Take into consideration that your museum might attract different visitors than the next venue. How can your design make room for adaptation and changes from venue to venue? Will your design allow other hosting institutions to change content based on their own collections or community relevance?

When conducting front end analysis in multiple areas that the exhibit may be traveling to, try to discover how well your target audience understands the content you are developing. This will help determine the type of language or vocabulary you may choose to use in order to tell your story in a more dynamic and rewarding manner.

Is your audience targeted towards school children, or adults? University students or scholars? Determining this up front will help solidify the story you intend to tell to a broad audience.

Guiding Principles
CUSTOMIZE CONTENT

Perhaps the success of a travelling exhibit is in the design of how well it speaks to what is culturally happening at the time. Are there pressing health issues? Recent natural disasters? Any sort of current phenomenon might bring on interesting and dynamic discussions, offering traveling exhibitions a chance to connect relevant issues going on in the community, nationally or internationally.

Travellers can also act as a catalyst for showing relevant objects from your own collection. This allows for greater adaptability in travelling an exhibition to specific venues or even creating a story that showcases and connects with your collections and considers other museum collections. This may open opportunities for partnerships between institutions as well. What becomes relevant is how well the exhibition speaks to existing collections or borrowed collections, ideas and resources.
CONSISTENCY

There may be a discussion from one institution to the next concerning graphics or design elements. Keeping a traveling show consistent in terms of design, content and installation ensures that every visitor in every venue is experiencing the intention or big idea of the exhibit. There could be instances where objects need to be omitted for spatial concerns or objects and content need to be added to adapt to that particular venue, graphics, text and basic design should remain consistent to the initial intention of the exhibition. This will also ensure that the story of exhibition is consistent for evaluations at each institution.

Designing for a multitude of spaces creates the challenge of trying to make your exhibit look and feel consistent no matter where it is. This topic goes back to making an exhibition customizable and/or adaptable between venues. Although the conceptual big idea should feel the same, allowing changes to customize the exhibition to a new community could be encouraged if not expected.

Guiding Principles
When designing the text panels and labels, an important interpretive element to take into consideration is that the exhibit may need to be translated into different languages. This challenge can be faced city to city or country to country. If you anticipate that other languages will be added to the text labels, it may effect the way you choose to communicate the exhibit. Some key ideas may be literally lost in translation. How will this effect the overall message of the exhibition if part of the meaning is not fully translated?

This will effect graphic design treatments as well. Think about how two or three languages will look and read on text labels and topic panels. Are your graphics easily interchangeable if needed? How can your designs enhance or support your graphic treatments?
If every traveling exhibit is built as its own environment, designers should consider how the visitors will use and move through the environment. For travel, each component needs to be tested for strength and durability. Arrangements should be made for any maintenance concerns, to ensure the exhibit is at its best at all times.

Making the design components accessible to every venue is key. Tools and products should be readily available in case a maintenance issue emerges. If something is specially made, easy and fast arrangements for replacements should be discussed before the exhibit travels. These concerns can be discussed in any sort of contract written between venues. Multiple copies or replacement parts could be on hand, purchased up front, and/or travelling with the show (i.e. light/project lamps). This is true of all types of museums and exhibition elements.

All of these variables could revolve around the cost of the chosen materials for the exhibition. If using an innovative ‘green’ design, for example, consider the cost maintenance with this type of choice. Also, what will the cost be in order to ship any broken components back and forth between contractors or venues? Could this issue be resolved or discussed on terms of a contractual agreement?
UNIVERSAL DESIGN

Unless you plan to send installers and de-installers along with a traveling exhibition, consider that people with different experience and knowledge of exhibit assembly may be handling your objects or exhibition elements. Designs should be flexible and modular, paying attention to size constraints, weight constraints and transportation. A travelling exhibit shouldn’t look like a “Do It Yourself”, but consider how others will interpret your designs, making sure all venues experience the same consistency for assembly.

Each exhibit will have its own standards and concerns. Make sure everything is clearly stated by including installation manuals or videos with diagrams and photographs. Be accessible for other institutions concerning questions about the exhibit. After all, having taken the time to develop, design and move the exhibition, it would be a shame if a component were presented in an unintended way or an element was broken because of inconsiderate design.

Knowing who will install and de-install your exhibition needs to be mentioned as well. Think about conservation here. If valuable objects are travelling to various venues, consider who will be handling these objects and if there are reliable resources and staff at each venue to handle the collection. If your exhibit is travelling to a library for instance, will library staff be installing the exhibit or should someone be hired for this process?
ORGANIZATION

True of any exhibit, staying organized and on schedule as best as you can could really determine how the design of the exhibit is realized. Accounting for every element of design, down to the graphics and object checklists could save a lot of time when a show travels. If the next institution has a clear list of contents and images of how the exhibit should look in the end, you make sure that the exhibit stays consistent and true to its original form (if of course that is intended).

When there are other museums and other professionals working with the same exhibit, being organized and having everything accounted for could save time and money.

Consider, for example, objects that travel with an exhibition. Each venue has the responsibility to complete condition reports, ensuring that if there is any damage to an object, the source of the damage can be reviewed. This can also happen with exhibition elements such as vitrines or models. Consider the responsibility of damaged exhibition elements and objects. What will happen once something is damaged? How can this process and information help to refine contracts between institutions?

Guiding Principles
EVALUATION

With every travelling exhibit, there is always room for improvements and changes. An effective way to track audience participation and feedback is through summative evaluations. Each venue should consider filling out and passing along summative evaluations as the exhibit continues to travel along the way. This could help developers and designers at all phases of the design to better understand the visitor responses at each venue. This shared information to all venues could be used to add improvements and further practices to future projects.

This can also apply to condition reports and contracts. Considering how well received an exhibit has been or how well the design of the exhibit withstands for how many years, can help to refine further projects and contracts into a more diversified approach.
CONTRACTS & INSURANCE

Any role played in the design of a travelling exhibition requires peer evaluation and support. When giving advice to the design or fabrication, make sure that all potential situations are covered. When consulting with colleagues from other venues, be clear of all situations or circumstances that can occur during the transportation, installation, fabrication, etc., of the exhibition. For example, insuring artifacts, exhibition elements, such as vitrines and cases, and tracking how each venue handles the exhibition through condition reports, could be stated up front through a contract.

If a colleague inquires about size and weight of an object to travel and does not consult with their fabricator before building, they could come back to you and put the blame on your advice. Be aware of professional limitations and always refer questions and concerns to appropriate and participating specialists.

These concerns can also be rectified with contracts stating the intended relationship between institutions and participating companies/institutions.

Guiding Principles
FLEXIBILITY OF DESIGN

Being aware that a traveling show should nicely fit into any venue and capacity leaves designers opportunities to explore self-contained environments. Focusing on the exhibition mission and designing for the exhibition, not for the building that surrounds it, may make an impact to the design and really help to diversify expectations and resources.

Ask yourself if you are designing for a series of “black boxes” or “white walls” or if the venues that your exhibit will travel to have certain design aesthetics that you may need to consider. Or could your exhibit have it’s own personality and live in any space or contrast any existing structures?

Issues of installation space and scheduling are important here as well. Are there installation standards that need to be addressed? Have you considered ceiling heights, loading ducks, weight restrictions, how many trucks you will need, hoists, crate storage issues, just to mention a few. If your exhibition needs to fit into four trucks in order to travel cost effectively, how modular are your exhibit elements? Something as simple (or complicated) as digital files are another example of design flexibility. When sending manuals and instructions for graphics and installation, will the digital files be compatible to all hosting venues?

Also consider the challenges you may face when hosting or producing a traveling exhibition. The flexibility of design may be entirely different if producing a traveling exhibition for your own institution than if you were hosting a traveller. Communicating with other venues, and being aware of any installation and shipping standards or restrictions will help to refine the final phases of the design.
BRANDING

Referencing institutional strategic goals can be just as important if not as relevant as referring to the mission of your traveling exhibition. The budget allotted for a traveling exhibition may be represented in the strategic goals of your institution. The culture of an institution will also have an effect on how a traveling exhibition is sponsored, the role sponsors play in the exhibition process and the subsequent effect on the design of the exhibition.

Consider the brand of the museum in relation to how the design of a traveling exhibition evolves. Where does the brand of the museum fit in the design of the traveller? Now consider the role of a third party and their brand. Sponsors are a key component to any exhibition project, and chances are, your sponsors will need recognition of their contributions somewhere in the design of your exhibition. How, if at all, will this effect the design of your traveling exhibition? Will your graphics need to be altered to accommodate sponsor logos? Does your exhibition need to follow the color palette of your institution’s brand? How can you effectively incorporate the brand of a museum, and the brand of third party participants into the design of a traveller?

Guiding Principles
The implementation of this project is intended to be a resource for shared knowledge among museum professionals for the design of traveling exhibitions. Aimed to target smaller museums or newer institutions and professionals in the field, the creation of these dynamic guiding principles lends the opportunity for museum developers and designers to (re)assess the process they undertake in creating a traveling exhibition. As a tool to further develop traveling exhibitions into functional ways to disseminate collections, knowledge and culture, these principles define and refine the challenges traveling exhibitions possess.

As a continuation of the guiding principles, a digital blog allows the principles to live as an evolving documentation for the experience of designing a traveling exhibition. The blog acts as an online forum for museum professionals to share their experiences and add knowledge to the newly organized principles. Over time, the blog will encompass an archive of shared knowledge for the design of traveling exhibitions, fully accessible to all museum professionals.
Defining the process of an exhibition will help to understand how this thesis project has continued to evolve. Every museum and institution will most definitely have their version of this process. The following example is just one, taken from standard architectural and construction languages. They have been refined into these seven phases as an example for the universal language of the exhibition design industry.

I. Research/Initial Concept
Involves literature, research (in and out of house), collections resources, subject matter specialists and front-end evaluation. The topic, story-line and information testing are formulated here to describe the project’s overall conceptual framework.

II. Conceptual Development
This process involves all educational content development, the organization in which the information will be presented, methods for visualizing and demonstrating the concept as a physical space, all to refine the initial concept and research.

III. Schematic Design
Designers work with developers to continue to refine and finalize all exhibit elements. Budget is assessed and organized and prototyping can begin at this stage along with the development of label copies, cases, lighting, graphics, etc. This phase also offers the opportunity to explore alternative approaches and variations in the design of the exhibition.

Process Phases
IV. Design Development
Includes the refinement of final plans for all physical elements, including graphics, prototyping interactive components, providing detailed instruction about sizes, shapes and the layout of the exhibition. Every detail of the exhibition should be finalized, captured and codified for this phase of design.

V. Construction Documents
Production of working drawings and specifications for the construction of all exhibit elements, including as-built drawings and construction drawings. Communication with fabricators is essential here, sending out bids for final construction documents.

VI. Fabrication/Installation
Project manager and designers oversee budget production and installation of all exhibit elements. Developers prepare programs and other support materials. This phase can happen in and out of house.

VII. Evaluations
Summative evaluations are performed at each venue, measuring how well the exhibition experience has been presented. An archive of the exhibition could also be created at this stage, allowing shared information of the analysis for the exhibition to become available. This phase allows the assessment of the exhibition, and for travellers, and should be shared between venues and possibly traveled with the exhibition.
As it is important to describe and define the phases that go into the process of an exhibition, relative to this thesis project; it is just as important to describe the museum professions that were explored during the front end evaluation of this thesis project. The following five professions were used during the front-end evaluation and analysis for this project. More detail of each museum profession as seen for this project is described below.

Developer
This is where the story of an exhibition begins. From the initial concept, to audience evaluation and through the research and schematic design of the exhibition. This role can encompass a number of tasks, and really depends on how large an institution is and what the staff resources are. Sometimes there are only three exhibition professionals on staff, sometimes ten or more. Also dependent on the museum is the description or title of a developer. This role can include curators, exhibition coordinators, project managers, educators and exhibition designers.

Whatever title you use, the development team focuses on digging deep into the subject and telling a dynamic story.

Designer
Understanding the importance of visitor interaction and the stimulation of senses, exhibition designers create environmental spaces in which visitors can experience the story. They should have a grasp on the subject matter and truly know the story that is being told, enhancing an exhibition experience. During schematic design and design/development, exhibition designers may consult with graphic designers, lighting designers, project managers and fabricators. The collaboration of these efforts, sometimes not always an in-house effort, evolves into the visualization of the initial concepts developed early on.

Fabricator
While sketches are being drawn and models are being built, fabricators can lend a hand in realizing the building and material potential of an exhibition. Building experiences are key for the

Nomenclature
success of exhibition fabrication and in the process collaboration with exhibition designers and developers will ensure success. This phase of the process could also include the refinement of transportation, crating and installation concerns. The relationship with a fabricator could help to better refine modular exhibition elements that need to be packed, shipped and installed.

Marketer
Getting an exhibition on the road and reaching audiences before and during that process is just one way of exploring the profession of an exhibition marketer. Any museum can measure the success of a traveller by how many visitors come to experience the exhibition. Getting the word out to as many people in as many effective ways is a challenge for the marketer. Understanding how an exhibition should reach audiences and in what fashion can be the efforts of developers, educators, designers and marketers working together.

Educator
The educator comes into play for an exhibition at many phases of the process. When an initial concept is developed, audience research is conducted to ensure that the story of an exhibition will be told in the most effective way for the target audience. Understanding visitor expectations and how people learn and experience various exhibition elements is where an educator can play a vital role in the development and design of an exhibition. By involving educators early on, the concepts and designs of the exhibition will be explored at all levels, ensuring the message and story is heard.
Blog Implementation
How are people thinking of blogs? What are the implications of a blog in deciding how this tool will be used for museum professionals discussing traveling exhibits?

The impact of blogs since their surge of popularity in 2005 has been phenomenal. All around the world, bloggers have been beating journalists from the broadcast networks, newspapers and online newspapers by sharing and publishing their experiences within an hour of experiencing them. Called ‘citizen journalism,’” blogging is not a threat to traditional media, but is another form of public expression that compliments journalism. For some it becomes a daily journal, documenting and speaking about personal experiences and opinions, inviting anyone on the web to post comments and share ideas. There are innumerable types of blogs and reasons for blogging, all sharing a common goal, to publish thoughts and ideas to anyone who wants to listen.

Choosing to develop a blog for the thesis project, brings the idea of listserves and websites to a more contemporary level. Blogs can acts as listserves, facilitate discussions and be a useful resources of information all in one digital package.
To create a space where the information gathered can be more fluid, blogs can act as an extension of already existing social networks such as ExhibitFiles, where there is a documentation of exhibit history. The blog will have two functions. First, the site will be a practical guide, offering the guiding principles as a downloadable tool to be shared among colleagues. Secondly, as a philosophical tool which also offers practical guidance. For example, each principle can be posted as a topic over the course of 14 weeks, with room for participants to post their own topics and challenges for fellow users. It will be a user facilitated online conversation for shared knowledge. For those that do not have the time to document their successes and challenges, they can post their thoughts on the site where they will be organized and categorized by shared principles. A professional social network for people, principles and conversation.

This is not a discussion of whether or not a traveling exhibit delivers it’s content well, questioning whether or not the visitors “get it.” This conversation instead is about the design process of a traveling exhibitions, how to make it fluid and how to extend the evaluation of exhibition to determine the ‘tools’ we need in order create a traveling exhibition.

The following paragraphs are examples for the types of discussion that can be shared digitally with the blog:

How does fabrication play a role in the design of an exhibition? The discussion of fabrication here is not intended to be about shipping and installing, rather how do we as designers consider a traveller as it’s own environment?

What is it about travellers that are different and challenging to design? Do they consider the buildings they will be housed in? Are they a series of vignette environments. Perhaps designers consider the building too much and put too much emphasis on making a travel show become seamless in a larger environment. Travellers need to be self-contained exhibits that have the potential

Blogging Topics
to ignore existing space and really create an environment that can easily adapt to any space or venue.

How can we augment traveling exhibitions to include traveling educational programs? Why are there no educational programs that travel with an exhibition? Can designers and developers come up with creative educational programs that become a part of the exhibition without having to be created outside of the exhibition space?

Have blockbusters sutured the future of other traveling exhibitions? What is the effect of a blockbuster on other traveling exhibitions? Do we, as designers, sustain audiences by creating blockbuster shows?
As a tool for the implementation of this thesis project, the *Guiding Principles for the Design of Traveling Exhibitions* blog is a tool for shared resources in the museum community.
Supporting Research
Considering that the audience for this thesis project is primarily targeted towards museum professionals from somewhat smaller institutions or newer institutions, at all levels of their careers, the members of ExhibitFiles were utilized, an online network of museum professionals, to approach with this survey. The survey was posted for a month’s time and was sent out to approximately 60 museum professionals.

A total of 20 responses were received for the survey and close to 20 personal email responses. In this section, there are a number of responses compiled according to which categorical profession labeled within the survey; developer, designer, educator, fabricator and marketer. Within each category, an explanation as to why these professions were targeted is included. In compiling the survey responses will also be an analyzed series of phone interviews implemented into the research that began the process of developing guiding principles for the design of traveling exhibitions.

Let us begin with some qualitative information.

Out of 19 surveys, there were: 6 Project Managers, 4 of which also assumed other roles
6 Developers, 4 of which assumed other roles
10 Designers, 1 assuming another role
2 Fabricators, 2 assuming other roles
2 Educators, 1 assuming another role

The majority of the survey participants have been working in the field from 0-5 years, where only a small percentage of those who participated have been in the industry for more than 15 years. The museum professionals that fall into the latter category were more likely to respond to this request through a personal email.

At the end of the survey was a question asking how the participant would like to see shared information on traveling exhibitions. Over 70% requested a web
site, with a Downloadable Manual coming in as the second choice.

In terms of quantitative information, included here over arching themes that are represented overall, quoting some specific answers as support of the findings.

DEVELOPERS

When designing the content of a traveling exhibition, there were many responses that spoke to audience diversity. As one participant responded:

“Yes, it is different because of the cultural education. It is not the same to grow in New York City than Tucson City or even more Mexico City for instance.”

There is a strong understanding that when developing the content for a traveling exhibition, there are more opportunities to reach wider audiences by evolving the exhibition into something larger;

“The main opportunity is to study how another people (country) think.”

DESIGNERS

It came as no surprise when an overwhelming number of participants addressed the differences in designing for a traveling exhibition in comparison to an in-house or permanent exhibition. The main challenges and differences involved the fabrication process and constraints with size and most importantly, space. Organization and measurements were also a factor for many. As one participant explained,

“Traveling exhibitions are designed differently right from the beginning in terms of: durability, installing in components, sizes of components, and packing issues.”

Because of this, it seems that the majority of designers face the challenge of designing an exhibition for travel more conservatively than they would for an in-house or permanent show.
The process of a designer for traveling exhibitions seems to lie with years of experience, only ever using manuals when needing to refer to specific requirements or restrictions. Many feel that through experience, participation and mistakes, the best guideline is practice! As one participant put it,

“Our own experience is the best guideline.”

FABRICATORS

Creating an exhibition is a collaborative effort. How an exhibition is built factors into how it was designed and perhaps even conceptualized. It is important to include the point of view of a fabricator when discussing the development and the design of an exhibition. Their expertise and knowledge of building and materials, especially for a traveling exhibition, could help initial designs and concepts early on, saving time and money in the end.

It seems that simplicity, lightweight materials and building with accessible hardware and materials are trends in the fabrication industry. Every traveling exhibit seems to have installation and technical guidelines. As one enthusiastic participant commented:

“Yes the exhibit guideline is crucial. People must respect your design and the story line of the exhibit! This document is quite hard to create!”

EDUCATORS

Museum educators are also a part of the collaborative efforts of an exhibition. Conducting visitor research and front-end evaluations, educators bring valuable knowledge to the creation of an exhibition during many phases. In terms of educational programming of an exhibition, typically the programs do not travel with an exhibition although some institutions provide supporting documentation or hardware to support the development of educational programs. Another thing to consider
is that learning skills and the level of educational programming differs from museum to museum, which can make this process more challenging.

MARKETERS

The marketing of a show, or the drive to get an exhibition on the road is integrated early on, in most cases once the development and the design of the exhibition has begun. Understanding how to target audiences and specific demographics early on, is just one reason to include the collaboration of a marketing expert during the conceptual phase of an exhibition. Understanding what a marketing expert can bring to the table early on helps to reach all potentials of an exhibition to be as successful as possible. Every travel show needs to reach wider audiences, so the graphics and design may differ in accordance. However, in most cases, the process of marketing a traveling show and an in-house or permanent show differ due to the content and audience.

In terms of overall challenges and consistencies that these participants encounter when working on a travelling exhibition, there was one response in particular that seemed to summarize the majority of responses:

“There are two main challenges to think in advance. First the conditions of the exhibition installation because of many times you don’t know where the exhibition will go. Second the visitor response because of his/her cultural growth or education.”

Front End Analysis
When competing with athletic events, theme parks and other entertainment based activities, museums have a reputation of being less than entertaining to many. How can object based learning evolve into an experience that is both educational and entertaining without using or implementing the term edutainment? As mentioned earlier in this project, exploring the implementations of blockbuster exhibitions to a museum and community is another project in itself but do lend a hand to understanding the design process of traveling exhibitions.

Some challenges are a result of the museum environment, such as physical distractions including crowds, noise, intimidating guards, hunger, bladder pressure and fatigue. Although this is true of all exhibitions, design for traveling exhibition must look at these factors in a larger context. If museums have administered audience research, factors can differ between museums and community and environment. How do designers factor in design for multiple spaces and locations?

Research in exhibit design should attempt to understand when and why activities are included in a particular project, it should be grounded in the observation of design practice, probably using interviews and observations rather than surveys. Understanding why a designer includes or excludes a specific component of an exhibit is fundamental to the development of that component and the overall story being told.
Traveling Exhibition Guideline and Specialist Sources:

American Association of Museums
www.aam-us.org

Arts and Exhibition International
www.artsandexhibitions.com

Association of Science Technology Centers
www.astc.org/exhibitions/index.htm

National Museums of Canada

Oregon Museum of Science and Industry
www.oms.edu/store/traveling

Paul Orselli Workshop
www.orselli.net

Science Museum Exhibit Collaborative

Smithsonian Institution Traveling Exhibition Services
www.sites.si.edu

Network Sites:

ExhibitFiles
www.exhibitfiles.org

Resources
Myriam Proulx  
Exhibition Travel Project Manager  
American Museum of Natural History

Jeffrey Wyatt  
Vice-President - Project Management  
Arts and Exhibitions International

Wendy Hancock  
Manager, Exhibition Services  
Association of Science-Technology Centers

Paul Orselli  
President and Chief Instigator  
Paul Orselli Workshop (POW!)

Monica Smith  
Lead Project Coordinator  
Lemelson Center for the Study of Invention and Innovation  
National Museum of American History, Smithsonian Institution

Jeff Courtman  
Director of Exhibit Development  
Museumscapes

Interviews
“The main opportunity is to study how other people think.”
· Survey Participant

“Exhibits are environments in which individuals learn and experience on many levels, both intellectually and emotionally.”
· G. Edson

“When you get on the treadmill to blockbusters, or whacky topic to whacky topic, how do you top yourself? We collectively, as a profession, maybe unwittingly train our potential audience.”
· P. Orselli

“Exhibition is fundamentally a subjective experience, what you take of it is yours.” · M.Proulx

“It’s not finished when it’s out the door, it’s started.” · M.Proulx

“Exhibition guidelines are crucial. People must respect your design and the story line of the exhibit! This document is quite hard to create!” · Survey Participant

“There’s always a challenge of wanting to reach out to broader audiences.”
· M.Smith

“There are two main challenges to think of in advance. First, the conditions of the exhibition installation because many times you don’t know where the exhibition will go. Second, the visitor response because of his/her cultural growth or education.”

Inspirational Reference


### Designing Principles of Traveling Exhibitions

1. What role do you play in terms of traveling exhibitions for the museum industry? (Designer, educator, fabricator, developer, etc.)

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2. How long have you been working on traveling exhibitions?

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<tr>
<td>5-10 yrs</td>
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<tr>
<td>10-15 yrs</td>
<td>25.0%</td>
<td>5</td>
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<tr>
<td>15+ yrs</td>
<td>20.0%</td>
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3. Are there any consistent challenges you face during your specific process or role into developing a traveling exhibition?

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4. Do you or your institution have working guidelines or principles you employ when creating a travel exhibition? If so, do these principles/working guidelines stay consistent with each exhibition?

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5. Of any philosophies or approaches you practice in creating a traveling exhibition, what are some of the stronger and consistent methods you employ to ensure success?

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6. Would you find it helpful to share your challenges and strengths in creating a traveling exhibition among the museum community and in turn learn about other’s strengths and challenges?

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<td>answered question</td>
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7. Is the narrative of the traveling exhibit different in comparison with in-house exhibitions? If it is different, can you express how so and why it is different?

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8. What sorts of opportunities do traveling exhibitions allow in terms of subject matter and content?

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answered question 10

skipped question 10

9. When developing exhibition specific programs for travelers, do you work collaboratively with other host institutions to somehow integrate visitor experiences? If so, please give an example.

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answered question 9

skipped question 11

10. Are there specific or distinctly different processes of design for a traveling exhibition versus an in-house exhibition?

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answered question 15

skipped question 5

11. Are there any references, such as manuals, guidelines or books you refer to when facing some the above challenges?

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<td>14</td>
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answered question 14

skipped question 6

Front End Survey Results
12. Describe some of the challenges you face as a designer for a traveling exhibition.

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<th>Response Count</th>
<th>Answered Question</th>
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13. What are some major trends you see developing in terms of material/hardware and construction for traveling exhibitions?

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14. Have these trends lent themselves to more sustainable/durable construction for traveling exhibitions? What are some specific examples you can share?

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15. During your involvement with traveling exhibitions, were there installation guidelines created as part of the process/project that traveled along with the show? Were you involved in the development of these guidelines? What were some of the critical points you/client included in the document?

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16. What would you tell designers to consider, above all else, when designing traveling exhibits?

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<td>answered question</td>
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17. How do educational programs for traveling exhibitions differ from educational programs designed for in-house exhibitions?

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18. What are some of the similarities or differences you encounter when designing programs for traveling exhibitions that are created in-house and traveling exhibitions that your institution hosts, but are developed somewhere else?

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19. Typically, do you try to integrate the educational programming of a traveling exhibition with other content from your museum?

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20. At what part of the design process for a traveling exhibition do you begin to implement strategies to market the exhibition?

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21. What are some of the similarities and differences when marketing an in-house exhibition to that of a traveling exhibition?

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22. What form of publication on traveling exhibitions would be most helpful?

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</table>

| answered question | 14 |
| skipped question  | 6  |
www.parisparfait.typepad.com

This site defines information really well, using color and contrast for hierarchy of the information.

The posts are clean, pictures clear and the side bar contains all of the information you could need, using font sizes, graphics and color again to define information.

Very user friendly, this site is also a paid for domain, hosted by Typepad.
These templates are preliminary sketches for the blog that will accompany this thesis document. Using blogger.com, a Guiding Principles blog will be created as a tool a resource for disseminating this thesis project.