

Your Personal Toolkit: Easing Through Friction, Fracas, and Free-for-All

by Donna R. Braden

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These days, the people who develop exhibitions together often arrive at the table with an incredibly wide array of backgrounds, perspectives, and values. Furthermore, people aren't always rational. Egos, personal agendas, and even language barriers often intrude. It sometimes seems nearly impossible to get people to agree on anything.

What is the source of this friction? I believe that Kathleen McLean hit the nail on the head when she described in her book *Planning for People in Museum Exhibitions* the two powerful opposing forces that exist within every individual involved in exhibition planning: the need to belong and be accepted by the group, and the need to stand out as an individual (1996). Books on the psychology of motivation describe three basic psychological needs that every individual possesses: autonomy (the desire for personal choice and decision-making), competence (the desire to develop, improve and use one's skills and talents), and relatedness (the need to belong, to have others accept and value us) (Reeve, 2005, p.105). These are different for everyone, and they will come out in different ways. How, where, and when these needs crop up for each individual, and how they are addressed, will have a lot to do with a smoothly functioning exhibition planning process.

After more than 30 years of working on exhibition teams, I now enter each new project assuming that there is always the potential for friction. I have come to realize that, more often than not, everyone will have an entirely different idea of what the project entails, what they will contribute, and what the final product could or should be. As the exhibition

planning continues, it is often likely that even when people nod in agreement, they are each picturing something different. This is logical—everyone has a vested interest in a project's success but everyone comes from a different place. And that can be a good thing. But it can also waste time and resources, sap energy and motivation, and send a project into endless cycles of delay, questioning, and revisiting. So my advice is—accept that friction might happen, even embrace this notion! But be prepared.

It helps to be proactive, armed with a host of creative ideas to help move things forward. In essence, these ideas address the complexities of both people and process—sometimes separately, but often simultaneously. People come with different perspectives, expectations, and intentions. Moreover, to some people, the word “process” implies a methodology that is straightforward, consistent, and black-and-white. But the exhibition planning process is often messy, circuitous, and full of gray areas.

The following describes several tools and strategies that I have adapted or created and used successfully to reduce exhibition frictions. These go beyond such standard exhibition planning tools as Big Ideas, goals, and bubble diagrams, and are applicable while working within an institution, between museum staff and outside consultants, or as an outside consultant.

Laying the Groundwork

Once the decision has been made to begin working on a new exhibition, the excitement is palpable. People want to get started and quickly move forward. Everyone knows what

EXHIBITION TEAM TOOL KIT: ITEM 1

Clarifying Expectations Worksheet

(provide percentages, each pair adding up to 100%)

Audience

Adults	Children and school audience
General public	Special interest audience
Tourists	Local residents

Experience

Immersive	Static
Artifact-heavy	Artifact-light
Self-directed	Facilitated
High use of technology	Low tech
“Teacher” (we provide info)	“Motivator” (we encourage action or change)
Tone is voice of authority	Encourages personal meaning-making
Addresses controversy	Non-controversial
Point of view	Impartial
Educational	Entertaining
Exhibit (non-staffed; remains virtually the same)	Program (staffed with live presenters)
Sequential (follow path)	Random (make choices)
Flexible	Rigid

the charge is (or thinks they do), and they all have lots of ideas about how to get there. But, wait! In reality, more often than not, people’s assumptions and ideas are tremendously divergent. Tools for laying the groundwork bring out the perceptions, the agendas, and the assumptions, and create an understanding of the parameters that will prevent misunderstandings later. Of course, at this stage, developing goals is critical, as is defining the roles that each member of the exhibition planning team will play. Determining target audiences (more than simply “everyone”) is also important at this point. All of these steps help give form and substance to the work process, as well as establish measures for everyone to work toward and return to again and again. At this stage in the planning, three additional tools are also useful.

Clarifying Expectations Worksheet (Item 1)

Friction-Reducing Goal of this Tool: Get the divergent opinions of stakeholders, team members, and consultants out on the table

early enough in the planning process to avoid conflicting expectations from cropping up later, while also encouraging buy-in from everyone right from the start.

This was an exercise that John Chiodo brought to us during the planning of our exhibition, ***Heroes of the Sky: Adventures in Early Flight***. Everyone involved in the project, at all levels, worked on this together. Since that time, we have honed and shaped this worksheet to meet different needs. The idea is to provide percentages to each binary pair of expectations. This should be done very early in the planning process. It not only provides a roadmap for future development, but also raises multiple issues and perceptions that might not ordinarily come out on the table this early in the process, before any actual decisions are made. This worksheet is almost purposely on the vague side, to elicit conversation and different perspectives. Rarely will any one category rank at 100% or 0%, and this is what makes the conversation interesting and fruitful.

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EXHIBITION TEAM TOOL KIT: ITEM 2

Clarifying Expectations Worksheet Criteria for Labels

Overall label objectives:

- highlight what's unusual or unique about the quilt—could be about the people and/or artistry

Other guidelines:

- try to focus on one story
- reinforce what visitors are looking at

Tone:

- informal but straightforward and accessible
- poignant
- respectful of the quilt's real story
- don't talk over people's heads
- not breezy or super-informal—not silly
- not aimed at experts—don't use jargon—but don't talk down to quilters

Audience:

- 8th grade level
- No assumed quilt knowledge

Heading/Title:

- 2-4 words
- Should draw your eye to the quilt and to the label to want to find out more
- It should still respect the actual story of the quilt

Subhead:

- Next layer down
- Can explain more about header and/or lead the reader into the text
- Very short—usually a phrase

Text:

- 2 sentences
- Anecdote, story or bit of information
- Makes the quilt come alive
- Light but not silly or overly breezy
- Watch language

ID info:

- Can be more technical than general label
- Use easy language where possible but without talking down to quilters
- Includes:
 - Name of pattern Maker, Place Technique, Material, Date made, Acc. no., and gift of

Team leaders must recognize, and help others to recognize, that their work is often not a total democracy.

Lists of Assumptions and/or Criteria (Item 2)

Friction-Reducing Goal of this Tool: Establish a yardstick with parameters for everyone to adhere to, providing clear, concrete definition to a vague and potentially contentious aspect of the exhibition plan.

Over the years, I have seen assumption and criteria lists used for many purposes: the design of overall exhibitions and individual exhibit components; the visitor experience; choosing artifacts or deciding on content, label tone and format; and ongoing maintenance and operation of an exhibition once it is open to the public. This tool is much more specific than the *Clarifying Expectations Worksheet*. Listing assumptions provides the opportunity for the exhibition team to document and get feedback on the actual charge. Is this what you imagined? Are we heading in the right direction? Have we missed anything? This also gives concreteness to the charge, which might sound perfectly clear to a senior manager laying out the vision for the project, but can seem abstract and too big-picture to the actual people doing the work. A recent example of this at The Henry Ford was the charge to “upgrade” our 20-year-old ***Automobile in American Life*** exhibition. I thought it was important for everyone to be on the same page about what we agreed would constitute an “upgrade.” The first thing I did was think of other projects we’ve done recently that might also be construed as “upgrades.” Comparing these to what I was hearing about this one, I made a list of assumptions about upgrades for review and feedback. This list of assumptions has come in handy over and over, as it is very easy for “scope creep” to occur during exhibition development.

Summaries of Findings

Friction-Reducing Goal of this Tool: Through easy-to-read syntheses, provide overt, constant reminders that individual perspectives are merely part of a larger group of inputs and perspectives that must be considered in the exhibition planning.

How many times have I heard complaints that various kinds of reports sit in people’s files and no one pays attention to them? I decided to be proactive about bringing these reports to the forefront, developing short summaries of these findings for use as tools that everyone on the exhibition planning team can easily access. I have done this for meetings with community advisors, focus groups, and scholars, as well as for visitor evaluations from our own or other museums with similar experiences. For example, in summarizing a scholars’ meeting for our ***With Liberty and Justice for All*** exhibition, I wrote up six key points that emerged, then included a bullet-pointed list of specific comments beneath each point. My summary of the front-end evaluation for this same exhibition summarized the purpose and methodology of the study as well as major take-aways for exhibition planning.

The Exhibition Work Team

Much has been written in the business and I/O (industrial/organizational) psychology fields about the principles of effective teamwork. These usually include such factors as: team members feeling linked together in a common purpose, mutual respect, willingness to accept feedback and back fellow team members, and interdependence between team members in decision-making (Muchinsky, 2009). When team members value and respect each others’ differing views, this kind of conflict

With parameters defined, the team leader can then make the best use of every team member's assets.

Every exhibition comes with constraints, and tools for laying the groundwork help exhibition planners understand what these are at the beginning of the project.

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can actually be beneficial. When applied to exhibition planning, this diversity can potentially make for a more interesting, unusual, and creative product.

Exhibition planning teams are organized in many different ways. These can range from the creative director with a personal vision (at the far extreme at this end of the spectrum is the person who always needs to be “right”) to the total consensus team with no leader, in which decision-making rests with all members equally. At the far extreme at this end of the spectrum, one might encounter the danger of “Groupthink,” in which team members, in their efforts to be collaborative, begin to think so much alike that they come to premature agreement with one another, keep opposing viewpoints from the team’s consideration, and maintain the illusion of group unanimity (Muchinsky, 2009). I/O psychologists refer to this behavior as “shared mental models” (Muchinsky, p. 299), and it helps explain the findings reported by McLean that teams that seem to be high-functioning may not always come out with the best exhibition product (1996).

The role of team leader is crucial to effective teams. The success of the team leader in planning an exhibition starts with his or her ability to internalize, articulate, and integrate the institutional vision into the group’s work. Team leaders must recognize, and help others to recognize, that their work is often not a total democracy. But everyone’s input is needed, and everyone’s strengths and expertise must be used to provide value, as a group, to the institution. I think of this as creativity within parameters. With parameters defined, the team leader can then make the best use of every team members’

assets. I believe that thinking about teamwork and collaboration in this way prevents one single person from taking over at the same time that it prevents “Groupthink.” It encourages the best contributions from everyone. Even within the “confines” of the group process, it is possible for a single creative vision to evolve from one person if this is desirable.

As an exhibition team leader, I have brought several tools to the table that help navigate through team members’ differences and encourage collaboration while, at the same time, inviting individual contributions. These include:

Object Discussion Worksheets (Item 3)

Friction-Reducing Goal of this Tool: Draw out content experts’ knowledge and expertise in directed, deadline-conscious ways, while also encouraging team learning and collaboration.

These emerged out of my background as a curator, yet work nicely with the quickened pace of exhibition development. Their format encourages curators and other content experts to talk about what they know within the structure of exhibition planning. These are designed as a customized list of questions about the objects in question, including such topics as: their significant features, social impact, and connection with exhibition themes and goals. This format not only respects curators’ deep knowledge and documents this knowledge on paper, but it also invites input from others and involves the entire team in a learning curve—together—thus enhancing group cohesion. The example included here was developed for discussing the airplanes in our ***Heroes of the Sky exhibition.***

EXHIBITION TEAM TOOL KIT: ITEM 3

Heroes of the Sky Exhibition **Object Discussion Worksheet for Airplanes**

- Synopsis (What is the main story? Why do we have it? Why did Henry Ford think it was important?)
- How does it show innovation, resourcefulness, and ingenuity in its manufacture or use?
- How does it further the adventure theme?
- Did it influence public attitudes? Does it have a marketing story?
- What kinds of themes does it bring to mind? Within aviation history? Within larger social contexts? (e.g., women's roles) Within the history of technology/nature of invention (e.g., why did people invent planes?)

Further research needs

Additional comments

Attach additional notes from published sources relating to this airplane

“Big Idea” Worksheets (Item 4)

Friction-Reducing Goal of this Tool: Empower even the most inexperienced team members to help create this crucial statement that will provide the underlying framework for all exhibition planning.

It's hard to write a Big Idea. I took a daylong workshop with Beverly Serrell, then had to practice for years before starting to feel comfortable with the process. But, what about the people involved in planning your exhibition who have no such experience? To help the team with idea generation, I generally develop a worksheet with different questions. This helps the group brainstorm words, phrases, and ideas that will eventually become a new Big Idea. Ultimately, I often write up a draft of the new Big Idea(s), then solicit feedback from the team. Here, I include excerpts from a worksheet I created after some team brainstorming of words and phrases, for a quilt exhibition that featured

unusual pieced quilts by Susana Hunter, an African-American quilter from Alabama.

Stakeholders, Decision-Makers and Other Power Brokers

Every exhibition comes with constraints, and tools for laying the groundwork help exhibition planners understand what these are at the beginning of the project. But, as the exhibition is being developed, it is crucial to keep senior management and other stakeholders informed and to solicit input from them, as these are the people ultimately responsible for the completion and success of the project. This encourages buy-in and commitment along the way, and prevents the potential of being blindsided later by some directive that was either unclear from the beginning or—typically—some directive that changes or emerges during the course of the project.

Senior managers are short on time and are

EXHIBITION TEAM TOOL KIT: ITEM 4

Susana Hunter Quilts Exhibition **Excerpts from Worksheet for Exhibition “Big Idea”**

Words that describe the visual attributes of these quilts:

Colorful, intriguing, puzzling, striking, bold, expressive, busy, asymmetrical, unpredictable, strong, improvisational

Words that describe Susana Hunter as a quiltmaker:

Intuitive, prolific, resourceful, practical, creative, strong, energetic, joyful, confident, proud, expressive

What do we want visitors to get out of this exhibit?

Connection to the culture, to the maker; inspiration; joy from personal connections and creativity; determination to make life better; understand true meaning of community

Visitors’ own words to describe the quilts (per Front-end Evaluation):

Entrée into an unknown world; “Lost treasure”; “Time capsule”; handmade; colorful; vibrant; unique; one-of-a-kind; authentic; warm; comfortable; patience; perseverance; artistic; full of life

FINAL BIG IDEA:

These visually exuberant quilts will, perhaps unexpectedly, intrigue and inspire visitors by providing entrée into the world of one quiltmaker’s aesthetic, creativity, and community.

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juggling many priorities. The exhibition that you have been so close to may be the furthest thing from their minds, so you need to offer succinct, focused tools for them to be able to offer their best, most informed feedback. Provide options for them to review and add their own perspective. In written reports and presentations, executive summaries are highly recommended. In emails or in-person meetings, a bullet-pointed list of questions is more likely to elicit feedback than a longer narrative. These are two additional strategies that I have found useful:

Pro and Con Lists (Item 5)

Friction-Reducing Goal of this Tool: Help enhance busy stakeholders’ decision-making capacities by providing multiple options in an efficient and consistent manner.

Sometimes simply offering options is not enough, especially for people who have decision-making authority about exhibitions but are short on time or perhaps have little experience in exhibition planning. For example, though we take it for granted, bubble diagrams may be a mystery to some reviewers. At times like this, I find it useful to lay out a few pros and cons for each option, to give people some common ground against which to weigh options. I often give reviewers the opportunity to add their own pros and cons, so that everyone’s opinions are considered and respected. Interestingly, I have seen directors get really excited during this process as, in a sense, this tool gives them permission not to feel as if they have to know everything to be good decision-makers. The example included here was prepared for a senior-level discussion of two different approaches to our **Quilting Genius** exhibition.

EXHIBITION TEAM TOOL KIT: ITEM 5

Quilting Genius Exhibition Pros and Cons of Two Different Approaches

Scope of Exhibition—Option #1:

The 13 Susan McCord quilts provide the focus to a stunning display of additional quilts that will delight visitors with their beauty and artistry.

The Strong Points—An exhibition of this scope will:

- Highlight a popular and nationally prominent collection that is rarely seen
- Test the Flexible Gallery as a place to display our own collection
- Drive traffic and repeat visits—appeals to mass market, women and already identified special-interest audiences (quilt groups, etc.)
- Be accessible to people without a lot of additional interpretation
- Have strong visual appeal
- Connect to brand—visual and technical “genius” in the creations of ordinary people
- Great potential of retail opportunities

The Challenges:

- Fragility of the quilts
 - need for specially designed tables or platforms for the most fragile (including 3 McCord quilts)
 - need for low lighting levels
- Security needs
- Dramatic quality of quilts is enhanced through jewel-like settings (display techniques, lighting, etc.)
- All of these challenges point to the need for a designer or designers (spatial, graphic, lighting)

Downsizing the Exhibition - The 13 Susan McCord Quilts—Option #2:

Advantages:

- Less expensive overall
- Less quilts needing conservation
- Less exhibitry to design and fabricate
- Less content development

Disadvantages:

- Does not use Flexible Gallery space and size to its advantage
- Cost reduction is not that great a value—still includes at least 3 platforms, other special exhibitry, lighting, labels etc.—reduced scope of exhibit does not preclude need for designer(s)
- Will not drive traffic—will not create “buzz”—outside the quilt groups, few people are familiar with the name Susan McCord.

Experience Briefs (Item 6)

Friction-Reducing Goal of this Tool: Get stakeholders and decision-makers on board and excited about your new ideas, with a document that is straightforward, concise, and accessible.

I am continually creating and/or refining tools that summarize elements of the visitor

experience for senior-level review and input.

While many longer documents are usually created as part of the exhibition planning process, these are usually not concise enough for this purpose, nor are they overt enough in their statement of senior-level expectations. A recent example of the need for this kind of tool

EXHIBITION TEAM TOOL KIT: ITEM 6

Automobile in American Life Upgrade Experience Brief for Texaco Service Bay

Experience Review Team Expectation:

“Activate” the interior service bay of the Texaco Station

Budget Allotment:

\$90,000 (\$50,000 for retrofitting the interior of the building, \$40,000 for new experience)

Intended Audience: Families with children 4-8, school groups (especially elementary)

Message (what we want visitors to know):

As more people had cars, simple gasoline filling stations evolved into full-scale service stations offering repair and maintenance.

Description of Experience (what will visitors do):

Visitors can imagine what it's like to be an auto mechanic. Oriented toward elementary-age children (and their parents), this experience uses small-scale replicas of actual service and repair activities and equipment from the past.

Expected Artifacts:

Historic auto repair manuals and equipment will be on display in wall cases.

Additional Issues/Questions/Concerns:

- Ongoing maintenance of activities and area
- Staffing?
- Interior “décor”: extent of era-specific immersive space? Use of authentic artifacts, reproductions, or a mix?

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References:

Grant, A. M., & Ashford, S. J. (2008). The dynamics of proactivity at work. *Research in Organizational Behavior*, 28, 3-34.

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Muchinsky, P. M. (2009). *Psychology applied to work* (9th ed.) Summerfield, NC: Hypergraphic Press, Inc.

Reeve, J. (2005). *Understanding motivation and emotion*. (4th ed.) Hoboken, NJ: John Wiley & Sons, Inc.

was a request to describe a series of discreet hands-on activity areas for the ***Automobile in American Life*** upgrade project, that were in the process of being conceptualized and designed. This became particularly important because of the limited budget for this project and the need to have deeper discussion among directors across several different departments. For this, I decided to adapt the format of the Media Brief used for RFP purposes. These so-called *Experience Briefs* included the expectations of our senior-level Experience Review Team, budget allotment, intended audience, message, description of the experience, related artifacts, and additional issues/questions/concerns. As ongoing discussions about these experiences have progressed, meeting notes and new decisions have been added to the initial Brief.

Conclusion

I have described just a few of the many

tools I have created for my own personal toolkit. Tools and strategies for laying the initial groundwork, including the *Clarifying Expectations Worksheets* and the *Lists of Assumptions and/or Criteria* described here, bring out people's individual perceptions, agendas, and assumptions early on, and create an understanding of the parameters that can prevent misunderstandings later. Two worksheets that I've proposed for the exhibition work team, the *Object Discussion* and *Big Idea Worksheets*, encourage individual contributions at the same time that they promote teamwork and collaboration. Finally, tools such as *Pro and Con Lists* and *Experience Briefs* allow busy stakeholders, decision-makers, and other power brokers to efficiently and thoughtfully fulfill their own challenging roles in the exhibition planning process. I offer you all of these tools and strategies to utilize, adapt, or revise for your own needs and purposes. ✨