THE WHEEL HAS BEEN INVENTED

How Documenting Work Saves Time and Money, Boosts Morale, and Improves the Visitor Experience

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When budgets are tight, conserving time and resources is crucial to success. Just as race-car drivers learn to preserve fuel by drafting off the lead car, cultural institutions can learn to "draft" off the successes, failures, strategies, and methods of their peers. Exhibition staff don't need to burn extra "fuel" only to arrive at the same technique or ideas others have already tried and solutions they have found. By actively recording, sharing, and preserving institutional knowledge – both within our own institutions and with the wider field – we can not only make better use of our time and resources today but also help those who come tomorrow.

As the exhibition designer and chief preparator at the Crocker Art Museum, a midsize institution in Sacramento, California, I'm charged with organizing and coordinating all touchpoints with the art as well as the look and feel of the visitor experience within the galleries. In 2010, two years after I started work at the museum, the Crocker opened an ambitious 125,000-square-foot expansion.

But an increased size doesn't always mean an increased budget, and even staff at well-funded institutions must often find ways to do more with less.

My team and I are responsible for everything from packing and installing artwork to fabricating gallery graphics, from designing and building custom frames and furniture to leading the transition to more environmentally friendly LED lighting. With so many tasks, it can sometimes feel impossible to step back and take stock of how we work. But it is precisely by taking the time to document our work that we've come to a better understanding of how to solve problems – without wasting time or resources reinventing the wheel every time. The processes and solutions I share below may seem obvious on paper, but they can be revolutionary in practice. Although each institution has its own unique challenges to overcome, the examples I've illustrated here demonstrate how recording and sharing institutional knowledge can not only save time and money but increase staff morale *and* create a better visitor experience.
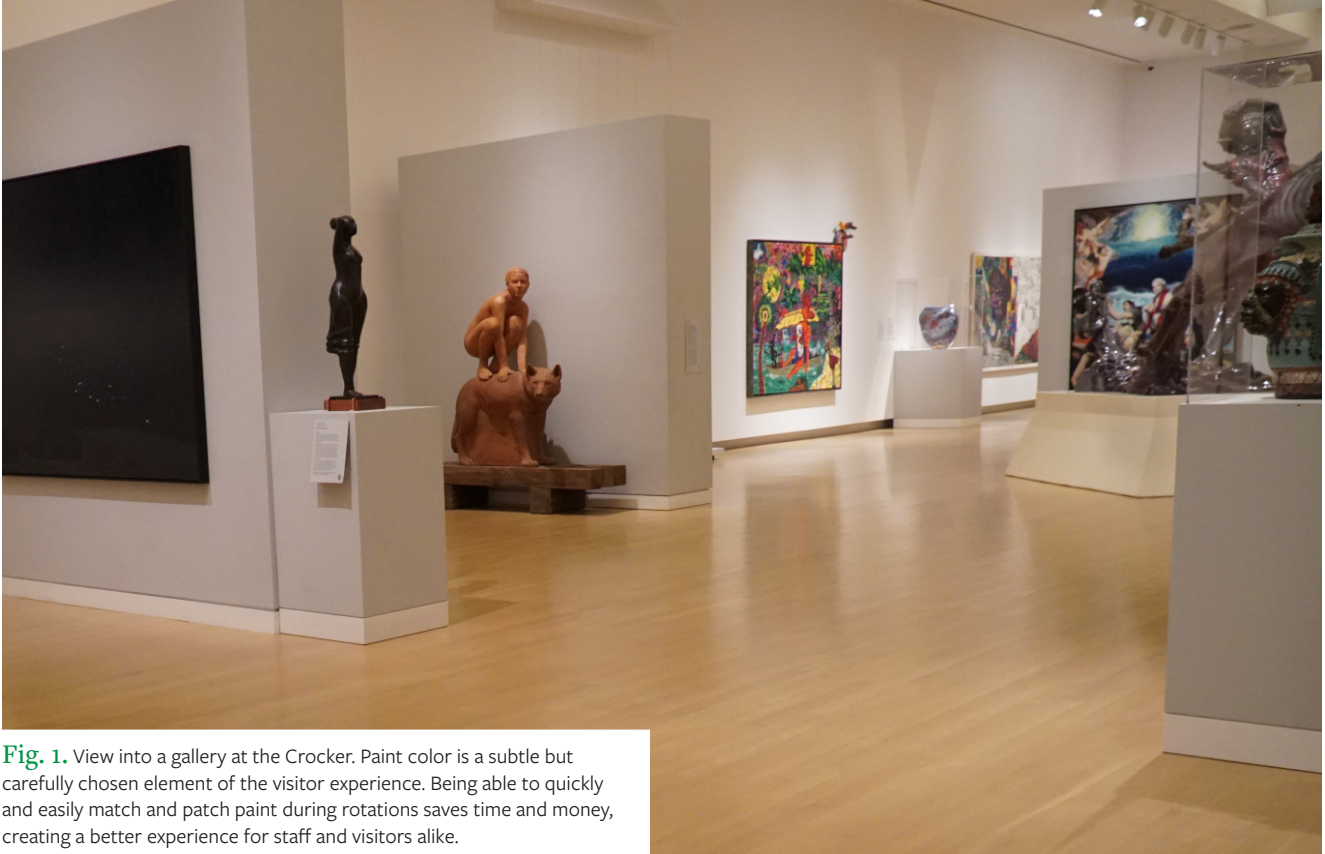
Fig. 1. View into a gallery at the Crocker. Paint color is a subtle but carefully chosen element of the visitor experience. Being able to quickly and easily match and patch paint during rotations saves time and money, creating a better experience for staff and visitors alike.
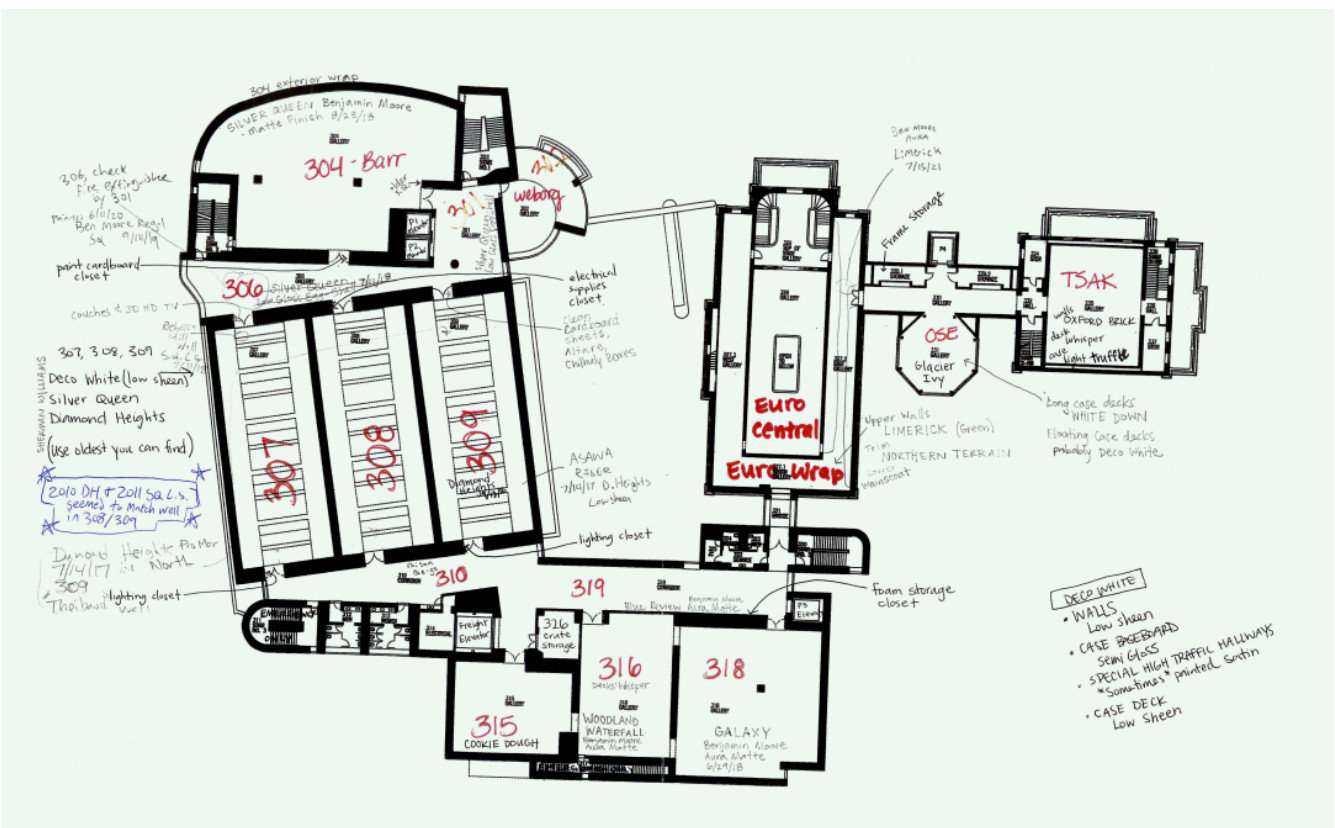

Fig. 2. A simple, annotated "paint map" includes all the details we need to know in one place, including the name, brand, and finish of the paint, as well as the date each gallery was last painted.

EXAMPLE 1

Paint Mapping

The Problem: Routine touch-ups during gallery rotations resulted in mismatched and patchy paint because the institution was not systematically documenting the colors and lot numbers of the paints it had used (fig. 1).

The Solution: Create a gallery paint map that includes all necessary information for matching paints moving forward (fig. 2).

Museums of all sizes are moved forward by many hands over many years. If we don't make note of the changes over time, we may lose track of where we've been. Rotations drive this point home, as they unfold over time and are meant to be grafted onto existing gallery installations without changing the overall visitor experience. A necessary part of museum work, they help protect light-sensitive and fragile collections while also allowing the museum to loan works to other institutions and refresh the galleries for repeat visitors. They also require a lot of work: switching even a single work of art often causes a cascade of changes that can affect all parts of a gallery.

The most notable of these changes is paint. Paint is expensive and painting is time consuming. Different sized works hang at different heights; pedestals and cases are placed in different areas; a single work may be replaced by multiples. All these changes (and many more) result in needed patches to affected walls. As preparators we strive for "perfection" and for our work to be invisible to museumgoers focused on the art. Because there was often no record of what paint had been used or when a gallery wall had last been painted, trying to precisely match the paint on the patched walls was time consuming and often impossible. To avoid a

patchwork of shades and finishes, we found ourselves repainting entire walls when, in reality, only a tiny area truly needed it.

It's like we were never there, and the art can take center stage for the visitor.

We could have continued working this way, but the costs in terms of budget, staff time, and morale were too great. Instead, we created a map, using an existing floorplan of the museum, where we record all the information we need to paint each gallery. The maps are centrally located in our workspace so everyone has easy access to the information. All new hires are trained on how and why we use the paint maps. We can now choose our touch-up paints more accurately using the recorded date, finish, and brand. Not only are the results more satisfying to our inner perfectionists, the gallery walls are more consistent and beautiful over longer periods of time. It's like we were never there, and the art can take center stage for the visitor.

Document, Share, Repeat

The Problem: Art coming from lenders and other institutions is often packed in unique ways to protect it during transit. Although unpacking and repacking instructions are sometimes included, this is not always the case. Our team needs to figure out how to handle each work safely and return it to its home as it arrived to us (fig. 3).

The Solution: We document each step of the unpacking process as it unfolds, making sure that we provide ourselves with step-by-step instructions for the safe handling and packing of all works of art on display (fig. 4).

There are a great number of specific, subtle details to the work we do at the Crocker. While many practices are standardized, we often also encounter novel solutions to the way art is packed, handled, or installed. For instance, art comes to us shipped using a seemingly infinite number of packing solutions. For the safety of the objects, it's important that we maintain the integrity of the packing materials. Additionally, artists use just about every known material to create their works. The way to handle some objects is obvious, while others require a specific approach. With the final installation there are several standard ways of hanging or displaying objects, but unusual techniques are not uncommon, and documentation is a welcome companion. In each of these scenarios we'd encounter a situation where we'd feel sure we'd remember something that seemed obvious in the moment, only to find out three months later that it would take a whole group of people brainstorming memories together to reverse engineer that "obvious" solution.

Documenting these details saves time and eliminates the pressure on team members to remember every piece of minutia about a work of art or its installation. We use two main repositories for retaining all these details: the registrar's files and an iPad. Registrars are typically the keepers of object information. They know when works are leaving, when others are coming, and where the works are stored. Although I've found that their files don't always capture special handling or packing instructions for individual pieces, as the repository for object-related information, they are an ideal location for these key instructions. Working with the registrar's office, we've been able to add special instructions as addenda to object files, eliminating the need to create a new system and ensuring that all information is stored in the same place.

In our temporary exhibitions, we've had real success with an even simpler solution: an iPad. We bring it to the gallery like any other tool. We pause work on each object that is packed in an unusual way, making sure that we document each stage of its unpacking. Several shots are taken as each layer is shed; multiple angles are encouraged. Three months later, when it's time to repack the work, we review those images as a crucial tool for getting everything back just as it came.

In some complex situations, we've needed to look outside ourselves and our institution to move forward successfully. In these scenarios, I've employed a mixture of outreach to museum colleagues, research

Fig. 3. A team member documents the crate conditions as it's opened for the first time.

Fig. 4. Multiple staff members are always on hand to ensure that each step of the process of unpacking or assembling a work is documented with photos, videos, and instructions.

on websites dedicated to museum work, and posting queries to professional forums to find other experts who have come across and successfully solved similar issues.

Confirming that safe packing, handling, and installation details are documented and accessible to those staff who need them has saved us hours of work – an easy morale booster – and ensured that each work of art is handled with care and respect, whether it is a beloved work in our permanent collection or a work temporarily entrusted to our care.

Fig. 5. Museums are filled with objects in cases. Organizing and keeping track of reusable exhibition furniture saves money and lowers environmental impacts, while ensuring a beautiful final display.

Fig. 6. Spare exhibition furniture in stored according to size and assigned a unique number in our master furniture binder, allowing us to locate it easily for reuse.
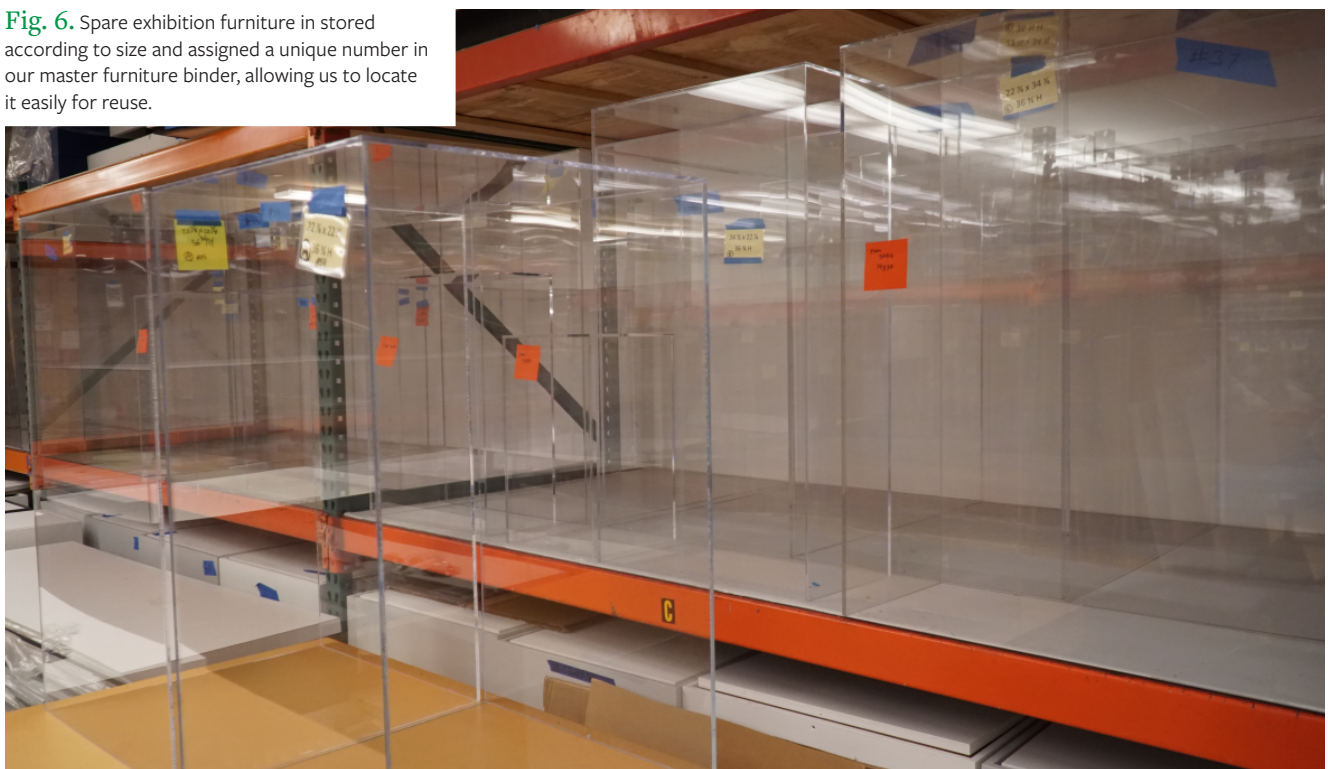
EXAMPLE 3

Keep a Master List

The Problem: Storing and reusing exhibition furniture is essential when it comes to saving time and money, not to mention lowering the environmental impacts of changing-exhibition programs. But unless museums are systematic in documenting the furniture, mounts, and cases they have in storage, finding casework to reuse can be a frustrating, time-consuming, and fruitless task (fig. 5).

The Solution: Our master furniture binder allows us to quickly search for and find appropriate exhibition furniture (fig. 6).

Museums often keep and repurpose exhibit furniture, mounts, and cut lists, but over the years these resources can get buried or may simply become too numerous to readily recall. When I first started at the Crocker, we had a reasonably finite number of exhibit cases, pedestals, and risers. As we built more, they began to take up more shared space with temporary exhibition crates and incoming permanent collection works. It started to take hours to check for exhibit furniture of a particular size; we never truly knew what we had on hand. It was tough on the crew's morale and took time away from the exhibition-installation workflow.

The crew and I set out to develop a cataloguing system so we would know if something was available or currently in use in a gallery. We waited until we were installing an exhibition that required almost all the existing furniture so it would be easier to measure everything, get a better sense of how large each group would be, and settle on a final organizational system. Based on this, we assigned a letter to each standard-size case (e.g., 24" x 24" cases are letter A) and separated the plexiglass tops from the bases on different pages so they could be mixed and matched as needed. We then loaded all the pages into a binder divided into the major case sizes. I now keep exhibition checklists next to the master furniture binder and enjoy "shopping" for the perfect cases from the comfort of my desk, confident that the furniture exists in storage.

We've updated the system three times now, each iteration cutting down on the time we spend establishing and pulling our exhibition furniture.

When it's time to pull furniture, the crew and I no longer feel dread as we once did, and the system has in fact empowered others to contribute their ideas to the process. We've updated the system three times now, each iteration cutting down on the time we spend establishing and pulling our exhibition furniture.

CONCLUSION

Recording and utilizing institutional knowledge doesn't have to be taxing or burdensome. In fact, I've found the rewards have far outweighed the initial efforts of getting such projects off the ground. We started with something simple and encouraged buy-in; we sought out experts to round out what we didn't know internally; and then we shared widely.

Documentation doesn't require fancy tech solutions, huge budgets, or the perfect plan; we just recorded what we were doing however we could. Iterations have come to us naturally. The key to success and buy-in has been bringing together and empowering stakeholders early in the process, seeking their advice and feedback at every step, and making it clear that this is a shared project. It doesn't have to be a museum-wide initiative to be successful, as long as the staff responsible for the work are on board. Since starting this process, we've become – as Seth Godin would put it – "linchpins," those who invent, lead, connect others, make things happen, and create order out of chaos.[1] At this point, documenting, sharing, and innovating are ingrained in the culture of the design and installation team.

Seasoned museum veterans and newcomers alike benefit from seeking out and drafting off experts in the field. Finding others willing to share their wisdom and expertise has increased my productivity and job satisfaction. It also has made me want to return the favor. I have amplified myself and the community by reaching out physically and digitally. Attending regional and national conferences puts me face-to-face with colleagues to swap ideas and discover solutions I didn't know I needed. Reading practical how-to articles and sharing my know-how with sites dedicated to the museum community, like MuseumTrade.org, has helped me and others get the job done and done beautifully.

Remember, your ordinary might just be someone else's epiphany and vice versa.

Documentation and processes are only useful when we share them with colleagues, make sure the information is easily accessible, and confirm that everyone is trained on how to use and add to them. Remember, your ordinary might just be someone else's epiphany and vice versa. We're better together. Knowledge sharing begets knowledge sharing, and there's no better day to start than today. ∎

1   Seth Godin, *Linchpin: Are You Indispensable?* (New York: Penguin Group, Inc., 2010).