

CREATIVE COLLABORATION



Rethinking Planning, Design,
and Fabrication Relationships

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Museum planning teams create exhibitions to educate, stimulate, engage audiences, and challenge visitors. It can be inspiring work, but depending on an organization’s culture and approach, the process can produce less than satisfying results.

During our time on staff at museums – and working for firms that support museums in exhibition design, development, and production – we have experienced a broad range of approaches to creating exhibitions. While comparing notes on the rewarding aspects of the process, Sara, who is a consultant to museums, and Cathlin, now developing new business for a production firm that supports them, wondered if addressing some of the challenges we’ve seen could create new opportunities.

In a recent American Alliance of Museums (AAM) blog post, Kathleen McLean, principal of Independent Exhibitions and the recipient of the 2018 AAM Distinguished Service to Museums Award, noted that “We still use the design development process that we’ve been using for the last 30 years. And as a result, I don’t think that most of the programs and exhibitions being created today are essentially different from their 1980s counterparts.” One challenge she sees is convincing museum professionals to take risks and embrace innovation. “In almost every project,” she writes, “I still struggle with the lurking presence of what I call ‘museum taboos’ and ‘change monsters’ – specters that reinforce unchallenged assumptions about processes, roles, and stakeholder and visitor expectations.”¹

1 “A Conversation with Kathleen McLean,” *American Alliance of Museums*, August 16, 2018, www.aam-us.org/2018/08/16/a-conversation-with-kathleen-mclean.

With McLean’s advice about challenging assumptions in mind, we looked at new approaches to planning that we believed could yield better exhibitions. In particular, we began to rethink the relationship between museums and outside service providers.

We had observed – and colleagues we’ve interviewed concurred – that some museums view independent service providers (such as designers, fabricators, and media producers) through an oppositional lens: they seem challenged by the idea that they are for-profit businesses, and see them as profiteers, not partners. At the same time, we’ve heard from colleagues that some service providers see museums as inexperienced. We believe there are ways to bridge these perception gaps and reap synergistic benefits, ways that can be achieved by identifying new methods of working together that privilege collaboration, communication, and transparency.

In this article, we explore how a shift in perspective can generate opportunities and create optimal relationships between museums and outside designers and fabricators. We focus on two familiar challenges of exhibition planners:

**Challenge 1:
Making your RFP work for you.**

For museum staffs, creating, responding, and evaluating Requests

for Proposals, Qualifications, and Information (RFP, RFQ, and RFI) from potential vendors can be exhausting! Having experienced this in our time as museum staffers, we must ask if there's a way to approach the selection of designers and fabricators that can add greater value on both sides. What if the request planning process were thought of as a strategic planning tool by museums? The request development process could be used to create institutional alignment, clearly define roles for all parties, and eliminate ambiguity from the project scope.

Challenge 2:

Getting the most for your money.

When budget and aspirations don't align, the value engineering process – in which the scope of the project is reduced, selection of materials or methods of production is reassessed, or the content is modified to fit the desired budget – can leave planners with a hastily refined exhibition that is a shadow of the original intent. What if the process of design and cost alignment were more iterative, so that both the museum staff and outside vendors had an aligned understanding of costs from concept through close-out?

Making Your RFP Work for You

For numerous reasons – level of staff experience, competing priorities, or organizational constraints – museums turn to for-profit design, development, and fabrication consultants. When it comes to

fabricating exhibitions, a 2011 survey found that only 15 percent of museums fabricate in-house, while 42.5 percent contract fabrication and 42.5 percent use a mixture of in-house and contract fabrication.²

Typically, selecting consultants involves a request process to identify potential hires whose experience and capabilities align with the museum's needs. We see the request process as an underutilized strategic opportunity for museums. It's a chance to convene a crucial conversation, clarifying not only an exhibition's content and goals, but also defining how it fits into the larger mission and vision of the organization. The internal work of preparing for an RFP, RFQ, or RFI can help staff to establish their vision for the project. It is worth considering the following:

- using the request-planning process as an opportunity for cross-organizational alignment of goals, expectations, and staffing;
- screening and being selective about sending out an RFP to potential business partners that fit the projects criteria and vision; and
- clarifying factors in assessing potential partnerships, including working style and alignment with the museum's core values.

We encourage museums to consider having strategic internal conversations prior to

2 "2011 Museum Exhibition Cost Survey Results," *Museum Planner Blog*, accessed December 8, 2018, <https://museumplanner.org/2011-museum-exhibition-costs/>.

sending out a request. Planning teams should discuss what has worked in the past, where they have experienced challenges, and what the needs are for a specific project. A well-balanced request planning team includes leadership, staff who will work directly with selected vendors, and those who maintain the exhibits. This team should define the big idea, goals, budget, and schedule, with consideration for input from stakeholders. They should also unpack and addresses any lingering “baggage” created by years of development and fundraising. This gives the project a fresh start, reduces frustration, and improves the chances for success. An added value is that when teams define a project’s criteria – for example, how success will be judged, minimum candidate qualifications, the schedule’s touchpoints, plans for debriefing – they begin to shift the process in a better direction.

While sending out the RFP to a significant number of vendors may bring a wide variety of respondents, this type of shotgun-blast approach can result in respondents with widely disparate qualifications, which can be confusing for the review team. We recommend identifying a limited number of recipients who have similar levels of experience and qualifications for an in-depth review process. We recommend screening candidates, checking with colleagues, and comparing each group’s strengths against the established criteria. We suggest meeting in person or using telepresence to conduct screening interviews prior to distributing RFPs. The result: a short list of more strongly aligned vendors who will receive the RFP.

Once the RFP responses have been evaluated, plan to conduct follow-up interviews with the top candidates. Structure interviews to provide museum staff with the opportunity to get to know potential partners and carefully consider how the firm or consultants’ approach and values align with those of your organization. Talk about the project’s potential challenges to hear first-hand how the team might respond to them. Written responses may yield carefully crafted responses, but a clearer picture of a team’s communication style comes through during an in-person meeting or video call.

Too often, due to scarce human and financial resources, vendor selection is driven by price. Since the measure of a successful exhibition considers many audience and institutional factors, it is worth considering if low bids are really returning good value. Be sure to ask vendor references about the quality of the work product and materials and frequency of change orders, which may lead to higher costs in the long term.

In screening potential collaborators, it is important to ask probing questions about aspects of the exhibition process you particularly value. In his *ExhibiTricks* blog, designer Paul Orselli advises that you “ask your design team to describe a previous project that ran into a snag or two, and what steps they took to address and resolve the challenges. If they can’t come up with a credible answer or, worse yet, say that nothing like that has ever come up – RUN!”³ Find out their approach to activities you

3 Paul Orselli, “7 ‘Red Flag’ Questions to Ask Before Starting Your Next Project,” *ExhibiTricks: A Museum/Exhibit/Design Blog*, August 1, 2018, <https://blog.orselli.net/search?q=red+flag>.

may want to pursue – such as soliciting community participation or prototyping elements – by requesting concrete examples of past successes and failures. Understanding how prospective partners have handled “glitches” tells you how authentically they will support your goals.

It is essential to find a partner who will invest in working with you (and for whom you will do the same) through good times and through challenging times. If the partner is new, remember that, like any new relationship, there is a learning curve.

When a museum must make quick, cost-effective decisions, a collaboration between designers and fabricators is critical.

In addition to weekly calls or meetings, build in time for informal assessments both throughout and at the end of your process. Discuss openly what is working and where both parties see room for improvement. If your organization has a unique audience, pedagogy, collection, or approach, repeated engagement with a partner can be a tremendous asset. Years ago, while working at the Brooklyn Children’s Museum, the Director of Exhibitions, Sharon Klotz, would say that “we’re looking for a team whose default way of creating exhibitions aligns most closely with our own.” When challenges arise – and they do – this metric has proven to be useful time and again.

A well-crafted request process doesn’t guarantee a successful outcome or positive experience, but it can help you find a design or fabrication partner who will carry you over the inevitable bumps in the most painless way possible. When the relationship is the focus of the selection process, parties are more likely to work together toward mutually beneficial solutions during the design and fabrication phases.

Getting the Most for Your Money

Most of us have been there: your team has worked to create a budget and scope, but the aspirations for an exhibition don’t align with the bottom line. Next step: value engineering – the agonizing process of cutting elements of the project to meet the budget. In some instances, the required cost savings undercut the work of the planning team. In the worst cases, entire exhibits are eliminated. That’s why it’s one of the best cases for creative collaboration.

When a museum must make quick, cost-effective decisions, a collaboration between designers and fabricators is critical. Aaron Goldblatt, Principal/Museum Planner at Metcalfe & Associates, feels that “The fabricator is the best group to give guidance for where savings can be had, and it is especially valuable to have those insights during the design development phase.”⁴ Identifying a fabricator early and including them in the planning process gives you the opportunity to flag high-cost or long-lead items, support prototyping efforts, and offer alternative means of production. Having this

⁴ Aaron Goldblatt, conversation with author, August 13, 2018.



fig. 1. Discovery Park of America presented a great opportunity for Kubik Maltbie, Inc. to utilize the design/build method to execute a very large and complex project, benefiting the museum in several ways. The museum had limited resources and experience, and needed additional outside personnel to drive the planning process. Both budget and schedule were very tight for a such a large project. The design/build method provided continuous budget checks throughout the process, ensuring that as designs were completed items were on budget and ready to build. Finally, with design/build, the team could transition exhibits into production as designs were finished, rather than waiting on a complete design package, which helped the schedule.

relationship in place helps museums ensure that they won't compromise the integrity of the exhibition due to their bottom line. Another approach to developing exhibitions is the "design/build" model that starts with all partners in place. While it could be months or even years before the exhibition is fabricated, establishing a relationship with a fabricator on day one creates an opportunity for continuous evaluation of the design against the target budget. As designs are approved and confirmed to be on budget, they can be rolled directly into production, saving both time and money. The design/build model works especially well when a project is large, the budget is tight, the timeline is short, or goals are ambiguous (fig. 1, p. 107).

Another approach is "negotiated pricing." In this scenario, the client, designer, and fabricator collaborate to determine a fixed cost for production during design development or final design. Scott Moran, Senior Director of Exhibits & Architecture at the California Academy of Sciences, points out that while most contracting processes are inherently adversarial, "if you go into the process with an open mind and approach design and fabrication as a partnership with good communication, you can work out the design challenges and get fantastic results."⁵ For example, in their *Skulls* exhibition, their collaboration with an outside vendor resulted in an elegant, but low-cost, modular system and the creative use of standardized hardware. Items that fell outside of financial feasibility were refined, redesigned, and replaced with solutions that aligned with the team's original design intent and success metrics (fig. 2).

⁵ Scott Moran, conversation with author, August 13, 2018.

If your museum's process doesn't allow you to hire a fabricator until the design is complete, consider reaching out to a few qualified fabricators to request budget estimates. Many fabricators offer "budget" pricing at a low (or no) cost. Investing in an up-front appraisal can save a lot of time, money, and energy. It can also establish the foundation for a transparent partnership or, at the very least, help you determine if you like working with them.

Turn Challenges into Creative Opportunities

Over the course of our careers, we've seen many changes in the ways museums create exhibitions. Technology has pushed us to rethink how visitors engage with us and our content. Human-centered design approaches have, in many cases, shifted how we consider multiple audiences in sharing information and interpreting content and artifacts. We've seen compelling ways that museum staffs have opened themselves to exploration and experimentation through creative collaboration with other museums and even with visitors. Moving forward, we see opportunities to develop collaborative approaches that creatively approach the relationships we build during exhibition planning and fabrication. We advocate for being strategic and transparent in all phases, especially in request planning and during development, design, and fabrication. We encourage museums to consider new models that are based on trusting, creative partnerships with contractors.

fig. 2. A negotiated pricing process enabled the California Academy of Sciences to put resources where they had the most impact. Designers and fabricators of the *Skulls* exhibition collaborated to arrive at a design vocabulary that included the use of standardized forms and hardware configurations for specimen cases and mounting hardware. The strategy allowed the project to be fabricated at a lower cost and installed in a shorter time frame.



Initiating any collaboration is not without challenges – finding the right partners requires work, communication, and a measure of risk. It's essential that an organization knows its core values and the goals of the projects it's trying to deliver. Museum teams generate a strong foundation and ensure internal clarity and alignment with outside consultants by considering:

- what's important to your organization and its audience;
- what you hope to come out of the process; and
- which complementary skills you need from outside partners.

We encourage museums to see challenges as opportunities for creative collaboration. Start small. Believe that it is possible to have more constructive relationships with your consultants. Dare to be transparent and to trust. Look for partnerships that complement your organizational core competencies and fill critical gaps. Cultivate a relationship mindset, communicate, and set clear expectations – all in the name of better exhibitions.

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