



# Developing Guidelines for Travelling Exhibits in Europe: The CASTEX Project

by Audrey O'Connell

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**T**his three-year project began in 2001 with funding approval by the European Union, the result of a competitive proposal submitted by the Royal Belgian Institute of Natural Sciences in Brussels. It ended in May 2004 with production of the CASTEX Guidelines for Touring Exhibitions in Europe by our own Touring Exhibition's team.

What were the challenges? Did it all go according to plan? Are we satisfied with the results? Could the CASTEX guidelines be useful for other regions of the world that wish to develop touring exhibits? And, finally, has it improved the networking between natural history museums in Europe?

CASTEX was a thematic network composed of five European natural history museums—Brussels, Paris, Leiden, London and Stockholm—with a number of shared objectives and deliverables due to the EU. Additionally, it was the intention of three of these museums to jointly invest in and co-produce a travelling exhibit in parallel with the CASTEX project. The strength of the CASTEX partnership was in part based on the choice of partners, as their individual expertise was tied to specific deliverables:

## **Royal Belgian Institute of Natural Sciences (RBINS), Brussels**

They have developed considerable knowledge in exhibit development. A bi-lingual institution, RBINS has many years' experience of EU project management involving other European natural history museums. RBINS is also a founding member of ECSITE, the European network of science centers and museums.

Their dual role in CASTEX: to lead inter-institutional and legal aspects; to define a framework for European co-production of scientific touring exhibits; to co-ordinate and distribute results; and to ensure dissemination of findings and recommendations to co-produce touring exhibits at a European level.

## **Museum National d'Histoire Naturelle, Paris**

The 'Grande Galerie de l' Evolution' in Paris is the second most important national natural history museum in Europe in terms of biological collections. Familiar with the presentation of large temporary exhibits, the museum has gained a wide experience of sub-contracting the building of exhibits (writing of terms of reference; calls for tender; identification of technical skills and museological methods). In addition, it has a proven track history of visitor research that, in particular, identifies interactions between visitors and exhibit elements.

Their role in CASTEX: Lead the cultural and development aspects; share museologic, scientific and educational approaches for raising public awareness in natural sciences.

**C**ASTEX stands for Common  
Approach for Scientific Touring  
Exhibitions, a set of guidelines  
developed to help museums  
produce and distribute natural  
history exhibits.



### **Naturalis, Leiden**

The Dutch natural history museum has expertise in project management acquired in the realization of a totally new museum, Naturalis, which is now managed as a private museum. This renovation has given the museum the rare opportunity of totally rethinking specimen collections and the use of new technologies for public awareness of natural sciences.

Their role in CASTEX : Lead technical aspects; share know-how and best practices to build a large scientific exhibit.

### **Swedish Museum of Natural History, Stockholm**

This is a good example of a museum reacting to new demands from the public. The use of hands-on and minds-on exhibits, combined with specimens from its large scientific collection and spectacular design, will be the basis of its development for the next decade.

Their role in CASTEX : Study of user's requirements; build a database of exhibit venues in Europe and assess their touring exhibit requirements.

### **The Natural History Museum, London**

The Natural History Museum (NHM) is the CASTEX partner with the greatest experience in the field of large travelling exhibits. It is also the largest natural history museum to have created a series of touring exhibits over the past 14 years. Professional staff have solid commercial experience of touring exhibits in Europe, the Middle East and the USA.

Our role in CASTEX: Lead user's requirement (touring); identify all parameters of touring an exhibit in Europe and produce guidelines reflecting best practice.

The key objectives for the CASTEX members were to:

- 1) Establish formal co-operation to share experience on a long-term basis.
- 2) Mobilize means and time in a formal framework to intensify exchanges at different levels between natural history museums.
- 3) Demonstrate the efficiency of a combined approach at the EU level by co-producing a science-based touring exhibit integrating museum requirements.
- 4) Establish and disseminate to other natural history museums and science centers a set of guidelines for repetition of this new experience.

The challenges for a project of this scale are enormous: both the co-production of an exhibit which will tour, and also the sharing of international perspectives on exhibit development, design and production in order to inform the co-production of a successful touring exhibit. Preparing a set of guidelines of best practices which would be useful for future exhibit projects was the NHM's particular task, and to do so with as much input from various sources as possible made it a very big task indeed.

The consortium of Brussels, Paris, and Leiden successfully launched the *Fatal Attraction* Exhibit in Brussels in April 2004. It has since moved to Naturalis in Leiden, and the Grand Galerie in Paris will be its final stop before it commences a more extended tour. The consortium is very pleased and proud of their collaboration and the resulting exhibit, as they should be, and are now in the planning stages for a second co-production project between a small group of European natural history museums.

The most inspiring observation from a CASTEX member who was not part of their consortium was that these three partner institutions and their representatives very quickly achieved an excellent rapport with each other. Through their regular face-to-face meetings they were able to easily overcome any problems. Their initial capital investment was equal; their business plan is fair and rational; they appeared to have listened well (in English) to each of their institutional objectives; they divided up responsibilities to take advantage of the particular skills each museum excelled in (either because of experience or because of a talented staff member); and, most importantly, there appeared to be a total lack of ego or arrogance in terms of "ownership" of the exhibit or the process in general.

On the other hand, the exhibit development timetable for *Fatal Attraction* was nearly totally out-of-sync with a parallel analysis and sharing of information the wider CASTEX partnership, especially in terms of end-user requirements or design-and-build for extended touring.

Nevertheless, a three-day workshop in Year 1 was organized in London for CASTEX partners and selected members of their museums. A cross-section of NHM staff representing Interpretation and Design, Touring Exhibitions, Engineering, Visitor Offer Services, Marketing, and Business Management, presented our methods and past experience. We solicited input and critiques from our European partners on exhibits in the Museum at the time. It was a valuable exchange for all of us, and demonstrated the importance of not only cross-institutional but cross-cultural museum exchanges.



As many of us know, producing a successful temporary exhibit can be a risky operation for any museum or science center. It demands significant financial resources in order to achieve a high quality exhibit likely to attract the maximum number of visitors. The risks are compounded with production of a successful touring exhibit where the stakes are pushed up even higher. Though *Fatal Attraction* will be moved to three museums in Europe, it was not designed and built to tour longer term without an infusion of additional funding for re-design and adaptation. This is not necessarily a problem, but may not be the most cost-effective way to develop a touring exhibit.

In my personal view, the four most impressive accomplishments developed by the *Fatal Attraction* consortium were:

- 1) the method of display of specimens without cases, as well as in cases combined with interactive displays;
- 2) extensive construction drawings for ease of maintenance and re-assembly of exhibit components;
- 3) some creative and robust packing materials; and
- 4) the methodology used to develop the science interpretation into four languages.

The exhibit text was written by Naturalis in Dutch, an outline of this text was distributed to the other two museums which used their own writers to re-develop their own unique texts, of course following Naturalis' general outline. In other words, there was no translation of an original text, but rather four original texts written in Dutch, Flemish, French, and English. The end result was a far 'truer' exhibit language than translations could ever have achieved.

CASTEX members faced another challenge from institutional changes which sometimes caused delays or, in some cases, less involvement over the three-year project term. Regrettably, the Swedish Museum of Natural History was unable to continue with CASTEX beyond the first year, and therefore the database of European venues was not delivered as part of the project. This information would have been useful to not only the CASTEX partners, but as an end result of the project.

Framework for Developing and Touring an Exhibition		Development, production & exploitation of exhibition				
Strategic Analysis	Business planning	Content	Design	Production	Home venue	Tour
	Marketing planning	Business marketing Business	Business marketing Business	Business marketing Business	Business marketing Business	Business marketing Business
	Logistics planning					
		Phasing, milestones, quality control, risk analysis				

The CASTEX Guidelines have been developed with the intention of serving as an *aide-memoire* for institutions wishing to fund, develop, design, build and tour an exhibit in Europe. We believe that this broader approach, rather than simply a manual outlining the design-and-build process, will help other museums and science centers to evaluate all dimensions of the exhibit development process, as well as the touring challenge in Europe and further afield. A holistic approach, beginning with the choice of exhibit topic through to the end of a four- to five-year tour, is covered. But this is definitely considered only the basis from which further work can and should be done in future. The following diagram from the Guidelines illustrates the 'healthy' framework which we believe is needed for developing a touring exhibit:

The Guidelines were developed from the perspective of a museum or science center choosing to embark on a touring exhibit development process, rather than of a commercial organization doing the same. The content relates more to the development of 3,500 to 7,000 square foot exhibits and is not intended as a guide for small or panel-based shows. Nonetheless, some of the information could be useful to developers of any size of touring exhibit. The need for evaluation is highlighted and various forms of evaluation suggested, but very little information on evaluation itself is included.

The process of information-gathering for the Guidelines included incorporating the direct experience of the co-producers of *Fatal Attraction* through a series of workshops and meetings in London, Brussels, and Paris. We also collected from a broader range of museums during the CASTEX Symposium in April 2004. Members of ECSITE (The European Network of Museums and Science Centres) have contributed to these Guidelines either by providing useful documentation for the Appendices, or during specific sessions on touring exhibits held during the 2003 London and 2004 Munich Annual Conferences. In addition, I and another NHM colleague conducted a research trip to North America and Canada where we visited 14 travelling exhibits (nine of them containing collections), and had productive meetings with museum and science center directors, public program managers and exhibit developers to help better inform us of the exhibit development process in these countries. And finally, we drew from our own extensive experience of having developed over a dozen travelling exhibits and managing tours to over 200 venues in more than 40 countries worldwide.

In order to draw up a set of practical guidelines, we have tried to identify key factors; indicate potential problem areas and highlight solutions; raise the questions which



should be considered and answered; provide checklists of information covering numerous areas; and give relatively short examples of best practice. This content was assembled into the following chapters: Strategic Analysis, Business Planning, Development, Marketing & Hire Contracts, Touring—Logistics, Evaluation, and Summary.

A rich selection of Appendices to the CASTEX Guidelines provides a great deal of additional information from the European perspective, with two American exceptions: of a sample AAM Standard Facilities Report (a procedure which has not yet been implemented in Europe), and the Field Museum exhibit process document authored by Sophia Siskel. The Appendices are:

- Success criteria score sheet for hiring a touring exhibit
- Success criteria—family audience—temporary exhibits
- Touring exhibits critical success factors
- *Fatal Attraction* pre-design visitor survey, Paris
- Field Museum exhibit process
- *Fatal Attraction* project timeline
- Sample tender document for Cern's touring exhibit
- *Fatal Attraction* designer contract points
- *Fatal Attraction* design candidates review criteria—edited sample
- ECSITE touring exhibit contracts checklist
- Sample loading plan
- Standard facility report—American Association of Museums
- *Fatal Attraction* memorandum of understanding
- CASTEX Visitor studies report
- *Fatal Attraction* budget
- Three *Fatal Attraction* gallery plans
- CASTEX collections report

A number of recommendations have been made for further work in the area of exhibit development and touring. These include applications for further funding from the EU for market research, standardization in a number of areas related to exhibit development and construction, and documentation related to facilities inspection and other touring exhibit methods for quality management and operations.

An important requirement of the EU is for the CASTEX results to be shared as widely as possible. And the CASTEX members themselves are eager to participate in and encourage dialogue between museums, both within Europe and across continents. We also have recommended that future symposia under the ECSITE umbrella could provide a forum for dialogue and even co-development of exhibit projects between museums and science centers. In recent months the RBINS in Brussels, which is leading a natural history museum interest group initiative, has agreed to organize under the ECSITE umbrella rather than set up a separate entity. We look forward to our first meeting at the ECSITE Annual Conference in Barcelona, November 4–6, 2004.

We welcome your feedback on the CASTEX Guidelines so we might progress further with the development of best practices for the touring of highly accessible exhibits which deliver cutting-edge science to a wide public. If you would like to be sent a PDF copy, please contact: Annika Morch, A.Morch@nhm.ac.uk.

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