BEST PRACTICES FOR LIBRARY EXHIBITIONS

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Best Practices for
Library Exhibitions

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Introduction

Exhibitions are increasingly popular across all types of libraries and information environments, including art libraries, archives, and special collections institutions. Through a series of collaborative reviews, discussions, and revisions, the recommended practices aim to provide a framework for exhibition practitioners within the profession, resulting in improved exhibition implementation. While institutions have idiosyncrasies in developing, implementing and evaluating their exhibitions, many face similar challenges and needs. Therefore, this document aims to provide recommended practices that can benefit library and information professionals in achieving their exhibition project goals. Furthermore, the document can offer real-world insights that complement library and information science programs curriculum and help students enrich their learning about exhibit development, curation, programming, conservation, and digitization,which are growing demands for librarian positions. Facing the ever-evolving changes that link to the global pandemic since 2020 and the anticipated adoption of the document, the Exhibition Standards Task Force (ESTF) treats it as a living document as it is subject to updating and refinement.

The recommended practices in the document are structured into three parts. Each of the section's topics include the definition and/or scope followed by recommended practices. The three primary sections are:

Exhibit Creation covers areas that pertain directly to the development of an exhibition from initial conception. Topics in this section include: Curation and Policies, Digital Exhibits, Diversity, Inclusion, and Accessibility, Loaning, and Policies with a special focus on COVID-19.

Exhibit Operations and Logistics covers ongoing issues related to exhibitions that pertain to collections, objects and physical surroundings. Topics in this section include: Facilities, and Conservation and Collections Care.

Exhibit Administration covers practices that support and sustain exhibits within organizations. Topics in this section include: Community Engagement, Marketing and Outreach, Documentation of Exhibitions, Evaluation and Financial Management.

Additionally, the end of the document offers an overview of the background of the Exhibition Standards Task Force (Appendix A) and a summary and interpretation of the online survey distributed to the ARLIS/NA list-serv (Appendix B). Lastly, an extensive list of sources (Appendix C) referenced for the creation of this document is provided for further reading. The source list includes recommended vendors and sample templates to help readers obtain necessary information to expand their exhibition efforts. It is by no means a comprehensive list but aims to provide a starting point to spark further discussions and learning.

The contributors acknowledge that there are various definitions and interpretations of the term "exhibits" and "exhibitions" as they are subject to the history, culture, and policies of individual institutions. To respect the diversity and embrace inclusivity, "exhibits" and "exhibitions" are used interchangeably throughout the document.

Exhibit Creation

Curation and Policies

Throughout the research process, the ESTF found that there are many different kinds of documents that institutions use and refer to as *policies,* formally or informally, (exhibition policies, loan agreements, general exhibition mission and methodology, etc.). This document offers guidance on creating and building best practices and general policies over broad, yet crucial areas within the realm of exhibitions. Recognizing that each institution has different policy needs dependent on size, resources, and mission, amongst other varying factors, the sections below offer starting points for building policies for a variety of institutional needs.

Curators can be internal (within the department, or cross-departmental, faculty, students, etc.), external (borrowing institutions and exhibitors) or collaborators (donors, artists, independent curators). The scope of curatorial involvement depends on the institution's size and how many are involved in the process, be it internal or external collaborators.

Recommended Practices

There are various types of exhibitions an institution may consider in the planning process that include but are not limited to:

- Exhibitions as a means to promote and display library and archival materials.
- Exhibitions as a space to display artwork.
- Exhibitions as a means to promote scholarly communication.

Regardless of the types of exhibition an institution holds, exhibition spaces require an individual or team to steward and oversee the space and exhibition life cycle. Depending on the institution's size, the role of curator may be given to an individual or become a shared responsibility of a team. As an organizer, coordinator, curator, or part of an exhibition team, the stewardship of the space comes with responsibility as works shown in the space are elevated in the local and scholarly community. When planning to curate an exhibition, consider the strategic goals of the institution, the community's interests and needs, and the capacity and interest of staff to run the space. Finally, diversity, equity, inclusion, and accessibility should be included from the start of the exhibition life cycle.

The following recommended practices offer suggestions on how to manage different curatorial responsibilities and steps to take when curating an exhibition:

- Write down the goal(s) of the exhibition and exhibition space. Reflect on the institution's strategic mission and priorities, and consider how the exhibition or exhibition space works towards the institution's goals. Determine if the exhibition's desired outcome(s) will increase circulation of library materials, increase traffic to the library, build partnerships within the community, raise awareness of library resources, and/or promote institutional research.

- Reflect on the exhibition's overall concept(s) such as the exhibition goal(s), strengths of the collection, current events, activities within the institution, and target audience. Additionally, consider diversity, equity, inclusion, and accessibility and whether or not implicit bias may be present.

- Create a project plan or project charter to help the team and any external partners understand the exhibition timeline and individual responsibilities. Anticipate mistakes so allow extra time when planning the exhibition.

- Conduct research based on the goal of the exhibition. In researching a particular collection, consider if the institution has enough material or the resources to afford the materials to build a narrative for an exhibition.

- Consider the potential of co-curating to bring in community voice. Investigate community interests and determine if an organizational partner might collaborate on an exhibition or on an event showcasing institutional research.

- Carefully select material to include in an exhibition. Remember what is chosen becomes elevated in the community and may become part of public and scholarly discourse. Consider the narrative the chosen material may tell and who may be excluded or included in the narrative. Ascertain the available space and equipment in order to properly determine the type and number of materials to be included in the exhibition.

- Exhibition documentation may become the responsibility of the curator or curatorial team. Exhibitions can be documented in a variety of ways including, but not limited to, catalogues, text, and labels. Print or online catalogues can serve as both documentation and promotional tools to accompany exhibitions. Additionally, an online archive of past exhibitions can serve

as both virtual documentation and as a promotional tool. Exhibitions may also require promotional text and labels. Writing texts and labels can be time intensive so it is recommended to allot extra time for this part of the curatorial process. Have an additional member of the curatorial team or library team review the texts and labels for correct grammar and spelling.

- Depending on the type of exhibition, installation may lie with the curatorial team or with the artist(s). If working with artists, researchers, or other external partners, it is best to have a clear contract or outline of responsibilities. Smaller institutions may wish to include a liability waiver when including the work of external partners.

- Incorporate marketing and outreach in the overall planning. Please refer to the *Marketing, Outreach, and Engagement* of this document for more recommendations.

- Opening receptions for exhibitions promote the work and bring people to the space. Opening receptions also provide an opportunity for programming and to promote library resources and services. Consider the exhibition's budget, if the artist(s) should be invited to the opening event, and if refreshments should be offered.

- Evaluate the success of the exhibition in meeting the original goal(s). Please refer to the *Evaluation* section of this document for more recommendations.

Digital Exhibits

As the need for libraries, archives, and special collections to demonstrate impact and relevance becomes increasingly important, it is additionally critical for libraries, archives, and special collections to develop strategies to make collections available online and accessible over time. Digital documentation of in-person/physical exhibits (supplemental to or surrogate of) should be standard practice. The design and implementation of the digital exhibit facilitates long-term preservation. Within the sphere of digitizing and preserving collections comes the steward's responsibility of ensuring accessibility to the individual works as copyright and donor restrictions allow. Online exhibits permit patrons access to works that may otherwise be inaccessible while offering additional context and interpretation of collections through curated content, narratives and metadata.

Digital exhibits can be created using digitized content or born-digital records as a standalone virtual exhibit online, as a supplement to in-person/physical installations or as digital surrogates of in-person/physical exhibits. Furthermore, the recommended best practices should be applied to any type of curation platform, whether it provides a continuous, real-time flow of content or a more traditional static display of selected content. The following recommended practices apply to institutions small and large and to all collections housed by an institution that might be used to develop digital exhibitions.

Recommended Practices

The following recommended practices offer guidance in the planning, implementation, maintenance, and improvement of the development of digital exhibits. The suggestions were drafted by reviewing numerous national and international organizational standards and professional associations with overlapping interests.

- Developing a digital exhibit requires an awareness of the intended audience(s), accessibility guidelines, and the concept of universal design. Ensure the extent and depth of topic coverage are suitable for the intended audience. Incorporate and represent diverse perspectives when appropriate. Design the online exhibit utilizing user experience principles that comply with Web Content Accessibility Guidelines (WCAG), the American Disabilities Act Section 508, and other related parameters. Finally, regularly monitor the digital exhibit for discoverability and accessibility. Please refer to the *Digital Exhibits* portion of the *Accessibility* section of this document for more recommendations.

- Present the content using a consistent design template within each and across curation platforms in order to create a more visually pleasing and easier-to-navigate presentation. Use widely supported file formats that comply with minimum digitization recommendations for online use. If required, include institutional branding on content pages.

- The technology utilized for the digital exhibit needs to effectively communicate exhibit content and should implement a variety of appropriate interpretive and interactive media. Utilize responsive web design to permit mobile engagement with a variety of devices. Link elements of the online exhibit to full digital copies, collection records, and other relevant resources to enable discovery of broader contextual information. Regularly assess and update the technology utilized for the digital exhibit as needed.

- Ensure the content of the digital exhibit is based on appropriate research and is accurate and relevant to desired theme(s). The amount of textual work used in a digital exhibition should be appropriate to its educational purpose. The content should be well organized and adequately cover the extent of the subject based on exhibit goal(s). Incorporate photographs, graphics, and multimedia relevant to the subject to enhance the viewer's understanding of the topic and cater to different learning styles.

- Be culturally sensitive when choosing and presenting materials, and advise online viewers of potentially offensive/troublesome content when/if appropriate. The content files of the digital exhibit should include all available metadata with a minimum of descriptive metadata. Try user experience testing with select internal and external groups if possible. Review the content of the digital exhibit regularly for currency.

- All content needs to be accompanied by attributions of original work, as well as the copyright status of materials and what constitutes fair use of the digital content. Bibliographic descriptions should be provided and checked for accuracy. Access to the exhibit content should comply with all donor restrictions. Ideally, the preferred citations for reproducible materials should be included.

- Finally, allow for viewer feedback to assess the impact of the exhibit. Please refer to the *Evaluation* section of this document for more recommendations.

Diversity, Equity, and Inclusion (DEI) and Accessibility

Expanding the voices that are represented in library exhibitions, both physically and online, is non-negotiable given that communities are made up of diverse groups of people. Diversity includes, but is not limited to, different forms of gender identity, race, sexual orientation, age, language, ability, and socio-economic status. Library exhibitions need to reflect the communities they serve regardless of organization type. Involving a diverse group in the curation, planning, and preparation of library exhibitions is central to ensuring different voices are shared and reflected back to the respective community. Libraries should regularly evaluate exhibition styles and methods to ensure inclusivity and appropriate levels of accessibility.

Ensuring that exhibitions, both physical and digital, are accessible is essential. Designing accessible exhibition experiences improves inclusion, creates more equitable experiences, and provides for a more diverse audience. Accessibility guidelines should not be viewed as restrictive; instead, they ensure the institution's exhibitions will have a larger audience. The principles of Universal Design inform the philosophical approach to accessibility for digital and physical exhibitions improving the user experience for all, not just for people with a specific disability. With this in mind ensure any contract or procurement with third party vendors include that products or services obtained will include accessibility measures.

The ESTF recognizes that the following recommended practices were drafted within a Western context. The ESTF promotes the ongoing need for libraries and memory institutions to commit to more diverse, equitable, inclusive, and accessible practices.

Recommended Practices

Diversity, Equity and Inclusion (DEI)

The following list of recommended practices to ensure diversity, equity, and inclusion is not exhaustive and is meant to be revisited, edited, and continually developed. The recommended practices offer actions libraries can implement in exhibition planning and curatorial approaches.

- Continually prioritize DEI initiatives in library exhibition policies and planning. Review current exhibition policies for singular curatorial perspectives and determine how more

voices can be involved in creating the exhibitions. Conduct an equity audit on what groups have been represented in previous exhibitions.

- Broaden the representation of voices of those who are developing exhibitions. Create an exhibits committee made of individuals from within the organization and broader community. Hire diverse staff to be on the library team and involved in curating exhibits. Create exhibition internships, scholarships, and learning opportunities for students and community members from underrepresented groups. Leverage liaison and outreach librarians to assist with engaging the populations served to be involved in library exhibition planning, curating and display practices to work towards diversifying those involved.

- Align exhibition programming with the institution's office of diversity calendar of events. Coordinate communication of library exhibitions with local community events that are organized by Black, Indigenous, people of color,and those identifying as intersectional groups of people.

- Invite visitors to write exhibit labels in response to the displays and to encourage co-creation of knowledge. Work to include a more diverse representation of materials from the organization's collections and from the community the institution serves. Promote library exhibition spaces as open areas in which various groups of people may gather and engage in conversation with one another, whether from different departments on a university campus or from different regions within a city.

- Require staff to determine how exhibitions promote diversity. Request viewer feedback regarding diversity in exhibition assessments.

Accessibility

Physical Accessibility

- Implement accessibility from the start otherwise more work is required to correct throughout the exhibition implementation process. As part of the planning phase define how the interpretive theme and information presented within the exhibition meets accessibility requirements by effectively communicating to visitors with sensory, mobility, and/or cognitive disabilities.

- Partner with staff from other library departments to create related displays in their areas, broadening access to the material. Specifically involve people with disabilities in planning to involve their perspectives.

- Everyone learns best from an organized exhibit storyline. Present content for multiple intellectual levels on the topic. Avoid using jargon.

- Ensure that the building, services and amenities, such as doorways, technologies, bathrooms and hallways, are compliant with country and/or regional accessibility guidelines.

- Present information in the exhibit and supplemental information via multimodalities (e.g. text, audio, tactile, visual) per Center for Applied Special Technology (CAST) Universal Design for Learning guidelines. Understandably, many items in an exhibit, such as historic artifacts or creative works of art, may not be inherently accessible. Providing multiple ways of experiencing such objects ensures more accessible exhibit experiences.

- Provide alternative means of experiencing audio, image/objects (still, moving, 3D, etc) and text:
  - For analog or digital audio containing speaking, singing, or narration offer digital and analog text-based transcripts.
  - For still and 3D objects/images provide descriptive verbal narration audio and text-based transcripts.
  - For visual recordings (tape, video, film, digital, etc) containing speaking, singing, or narration include text-based open captioning and text-based transcripts.
  - Provide tactical touch alternatives or representative surrogates for as much of the exhibit as possible.

Physical Installation

Exhibit Cases

- Pedestals or table bases should not exceed 915 mm/36 in height. Cases with adjustable shelving, such as upright exhibit cases, should be adjusted accordingly with excess shelving removed.

- If items within an exhibit case need to be seen, such as a bowl or an open book, the item should not be placed higher than 915 mm/36 in.

- Exhibit case backdrop materials should be a solid background (no patterns, pictures, or graphics) to provide adequate contrast between backdrop and objects on exhibit.

- Small exhibit items should be placed in front and large items in back. Exhibit cases that are overcrowded cause visual and perceptual clutter for all and foreground-background discrimination problems for people with figure-ground perceptual issues.

- Audiences should be able to get near exhibit cases with ample floor space. Many factors determine accessible routes; adhere to country and/or regional accessibility laws. As a general reference, the Americans with Disabilities Act standard for main passageways is to permit a minimum width of 915 mm/36 in and a minimum width of 1067 mm/42 in for corners and turns.

Wall and Ceiling Mounted Objects

- The general practice for hanging labels is 1015 mm/40 in from the floor permitting a shared sightline for all seated, short of stature, and/or standing adults. Labels at a 45 degree angle are easier for all to read as opposed to flat surface installation. Label rails should be at 1015mm/40 in height as well. Place labels in a prominent place; people with low vision may need to get as close as 75 mm/3 in to read the labels.

- The base for small exhibition objects should fall within the range of 1015 mm/40 in to 1270mm/50 in for height to meet common sightlines. The base for larger exhibition items that require wall hanging should fall in this range as well.

- Items may not protrude more than 100mm/4in from the wall unless the item's bottom meets the angle for cane detection 685 mm/27 in from the floor. Floor guards are useful for protecting oversized items but must also be cane detectable and could be considered a tripping hazard for all.

- Provide a clearance from the floor up of 2030 mm/80 in for objects hung on ceilings to permit safe passage for those with low vision and for people of taller stature.

- Avoid floor mounting of small items that pose a tripping hazard for all. Large floor mounted items, such as sculptures, should be placed out of the area of common circulation and should be placed on a support pedestal. The pedestal should be a contrasting color from the floor material and should not have sharp edges.

Lighting

- LED lighting is the default for directional, spotlight, and ambient lighting in exhibit spaces. Lighting levels will also be defined by conservation requirements.
- 100 lumens per square meter (lux)/10 foot candles (fc) is the minimum light level that a person with low vision can see an item.
- Recommend ranges for lighting exhibit spaces (not for objects deemed light sensitive or fragile):
  - Text panels, ramps, stairs, pathways: 100-300 lux/10-30 fc
  - Exhibit objects and directional signage: 200-300 lux /20-30 fc
- Alternative methods for lighting objects deemed light sensitive or fragile:
  - Light environment, not object directly
  - Provide a high contrast background
  - Present a surrogate, such as a print or brochure, that can be held by all audiences and viewed in brighter light

Graphic Design and Supplemental Content

- The language and tone for label and text panel copy should be simple and in the active voice. Write for a broad audience. Avoid slang, metaphors, long sentences, and overly academic language.
- Present text information as small chunks, not large blocks of information.
- Include line drawings, universal symbols, or images to provide alternatives to the text information.
- Ensure there is proper color contrast. The general best practice is dark text on a light background. Black text on a white background has a 100% contrast; the minimum acceptable contrast is 70% percent. This applies to color used in physical print and digitally.
- Do not use glossy papers and materials for reproductions, text panels, and labels because they create a glare posing an obstruction for all audiences, particularly those with low vision.

Fonts and Typesetting

- The general best practice is to use a sans serif and web-readable font.

- Avoid fonts smaller than 20 to 24 point.

- If audiences are required to view text from more than 75mm/3 in, the font size must increase. For text viewed from 1 meter / 39 in, use a 48 point or greater font; for text to be viewed at 2 meters/ 78 in use a 100 point font or greater.

- Use one font type constantly for all text in an exhibit including labels, text panels, and marketing materials.

- Use ragged right margins for labels and text panels.

- Always present text on a solid background; never overlay on images or patterns.

- Provide ample leading between text lines and borders (margins).

- Avoid font variations (light, script, italic, bold, all capitals) for essential and instructive information. Quotations and underlining are an alternative and are generally perceivable.

Digital Exhibits

The World Wide Web Consortium (W3C) develops international standards for the Web. This group has a Web Accessibility Initiative (WAI) that develops global strategies, standards, and resources to make the Web accessible to people with disabilities. These standards are known as the Web Content Accessibility Guidelines (WCAG). There are different levels of compliance with these standards. Work with the organization or platform to understand what is needed to produce accessible digital exhibits and other exhibit related web content for the organization. Valid HTML and Cascading Style Sheets (CSS) promote accessibility by making code more flexible and robust.

Structure and Elements

- Assign each page a unique and informative page title.

- Use headings to convey meaning and structure.

- Present information with list and bullet functions.

- Ensure users can navigate without a mouse.

- Ensure that all form elements (Javascript event handlers like text fields, checkboxes, dropdowns, etc.) have a label and make sure that label is associated with the correct form element.

- Ensure the user can submit the form and recover from any errors, such as the failure to fill in all required fields.

- Ensure accessibility of non-HTML content, including PDF files, Microsoft Word documents, PowerPoint presentations, and Adobe Flash content.
- Provide meaningful hyperlinks by using a fully descriptive title for the link, not "click here".

Text and Tone

- Write in short and clear sentences and paragraphs.
- Write for a broad and global audience.
- Avoid using complex words and phrases.

Fonts and Layout

- Use web-readable and sans serif fonts.
- Use large font sizes.
- Avoid font variations (light, script, italic, bold, all capitals).
- Use one font type consistently.

Design

- Do not place text over images.
- Provide ample leading, borders, and spacing.
- Use color combinations with at least 70% contrast.
- Don't use color to convey meaning.

Images

- Provide descriptive alternate text (alt text).
- Do not place text over images.
- Understand image types and uses.

Audio and Visual Recordings

- Include text based transcripts.
- Include open captioning.

Censorship and Controversial Exhibits

- Libraries can and should provide a safe space for the free and open exchange of ideas in all exhibition endeavors and spaces.
- Libraries are theoretically neutral whereas exhibits inherently hold a point of view. For every exhibit proposed consider the important balance of:
  - freedom of expression;
  - neutrality of instructional information;
  - providing an inclusive safe space.
- Libraries can post notice that exhibition spaces and exhibits are available as a service for its patrons, but the exhibitions may not reflect the viewpoint of the library (American Library Association). Libraries can also post advance notifications for content that could be deemed upsetting, controversial or traumatic.

Loaning

Overall, public and collegiate libraries are lending institutions where most of the collection can be checked out and loaned to patrons. Additionally, most libraries have interlibrary loan policies for circulating items that can be loaned to patrons of other library systems; however, such policies are different from the needs for library exhibitions. Loaning in terms of exhibitions pertains to items that will be used by another organization for exhibition or items an organization requests to borrow specifically for display in an exhibition. Such items are typically specialty items that do not circulate and are part of special, archival, art, museum collections, or private collections. In addition to exhibition loans, there are additional types of loans, such as long term, study loans, exchange loans, promised gifts, fractional-interest gifts, and unsolicited loans. Consult with the organization's legal counsel for crafting according policies when such instances arise.

Exhibition loans, either incoming or outgoing, improve equitable access to collections, increase awareness about a library, enhance exhibitions in terms of offering a variety of item types, and support the intellectual context of an exhibition. Establishing an exhibition loaning policy and implementing the procedure is good collection management, provides legal and insurance protections, and makes certain that collection items receive proper care while on display and in transit.

The following recommendations are based on the practices created by library and professional organizations for collecting institutions. There are fundamental best practices that any institution should adopt if pursuing incoming or outgoing loans for exhibitions; however, the policies can be scaled to the size and abilities of an individual organization.

Recommended Practices

- Create an Exhibition Loan Agreement (a memorandum of understanding document) and have this document reviewed by the organization's legal counsel and insurance provider to ensure collection items and organizational interests are protected. This legal agreement will be used when a loan request is approved for all exhibition loans from the collection. Specification amendments or terms can and should be added to this agreement because all items and exhibition circumstances are unique and require specific terms. Nothing should be

endeavored to facilitate the loan until this document is signed by all parties. Establish who has the authority to sign the Exhibition Loan Agreement on behalf of the organization and the appropriate party from the requesting organization. Typically, only authorized individuals at an organization (e.g. administrators, registrars, purchasing agents), are allowed to sign contracts such as an Exhibition Loan Agreement on behalf of an organization. Work with legal counsel to understand country and regional laws.

- Create an Exhibition Loan Policy and ensure it is publically available on the organization's website or available upon request. Internal workflows pertaining to loans such as security practices should not be public but should be internally documented. Consult other exhibiting libraries' loan policies in crafting a policy, but tailor the policy to the collection and organization's needs. The Exhibition Loan Policy should include the *process* (how loan requests can be made), *determinants* (what and who determines if an item can be loaned), and *specifications* (e.g. transportation, insurance, conservation, costs).

Process

- Establish how the organization will receive requests for loans whether it be through posted mail, email, or a web form. Require advance notice of the loan request scaled to the organization's abilities. It may take several months to review the request and have all the appropriate parties sign off on the loan. Most organizations have exhibitions planned a year or more in advance. University libraries often operate on the academic calendar to schedule exhibits, so there might be two to three exhibits per year in an exhibition space. Many organizations require notice of three months or more for a loan request, even up to a year or several years, at prominent organizations.

- Respond to all requests in a timely manner. Establish a time range of when all loan requests will receive a response.

- All loan request documentation and Exhibition Loan Agreements should be retained as part of the organization's exhibition records. Please refer to the *Documentation* section for more recommendations.

- Require the requesting organization to provide the reason for the loan, an exhibition description, and the point of contact for the requesting organization. Require the requesting

organization to provide all specific identifying information for the item being requested (title, catalog number, or accession number). For bound items or dual sided manuscripts, require the requesting organization to provide the specific page number or side the item will be opened to for the exhibition. Please refer to the *Specifications* portion of this section for more recommendations.

- Require a facilities report and transportation plan. Please refer to the *Determinants* portion of this section for more recommendations.

- Require that the requesting organization provide the full date range for the loan. This date range will include time for transport, on-site storage, acclimation, installation, exhibition, de-installation, and return transportation. Many organizations require that loans are onsite in advance of exhibition installation by a set date prior to installation. Please refer to the *Determinants* portion of this section for more recommendations.

Determinants

- Establish the point of contact for exhibition loans within the organization. Determine if the point of contact makes all of the decisions on what can be loaned or if some decisions should be determined by a committee. Exhibition curators, registrars, subject specialists, and conservators are the ideal candidates for such a committee. Determine if items of greater significance and/or greater value should require additional review from individuals with higher authority within the organization.

- Require that the requesting organization provide a detailed facilities report that includes climate, security, transport, and handling specifications. Information provided in the requesting organization's report is critical in determining if the loan is permissible. Such specifications should be provided at the same level or better than the lending institution. Document organizational baselines for these factors. For example, lending organizations might not want to lend to institutions without attending staff or security cameras in exhibiting areas or institutions that cannot provide facilities' reports. Please refer to the *Specifications* portion of this section for more recommendations.

- An item can be deemed not suitable for loaning because it is too fragile, it is a necessary element of a collection, or it may require periods of rest from exhibition. Though most

exhibition curators prefer not to use surrogates, a surrogate may suffice for the requesting organization's exhibition intentions. (Note: Surrogates work best as flat wall displays or as part of digital displays and not in exhibition cases.) Alternatively, determine if a different item from the collection would better suit the requesting organization's needs.

- If a loan request is denied, provide the requesting organization with the reason(s) based on established determinants. Examples might include conservation issues with the item, the duration of loan, or environment and security conditions at the requesting organization. The practice of providing the reason promotes transparency.

- If conservation issues are the only obstacle to loaning the item, consider asking the requesting organization to fund the conservation work. Funding for framing, matting, and support/cradle construction costs can also be requested as a term of the item's ability to be lent. Be prepared to provide an accurate account of the cost of such procedures.

- Determine if the item(s) on loan will physically fit out of the lending organization's spaces and into the spaces at the requesting institution. Both parties should think through the item's entire path of travel (every doorway, elevator, vehicle, loading dock, etc). If there is an obstacle that does not have a solution, the item may not be loanable.

- If a loan is approved, determine how the item will be packed and transported. Apply general standards to the packing and transport of all outgoing loans. For extremely valuable items, a staff member from the lending organization might be required to personally transport and install the item at the borrowing organization. Likewise, mandate that all approved loans require transportation by certified art handlers. Additionally, decide which organization will be responsible for any associated costs of transport (per diems, hotels, crating, couriers, etc). Typically these costs are endured by the requesting organization, but the added expenses might be incurred by the lending organization to promote collaboration or to assist with the financial burdens of the requesting organization. Request that the borrowing organization provide documentation of costs prior to entering any arrangements of cost sharing.

- Determine if there are any legal restrictions that could impose limitations to an item's ability to be lent and publicly exhibited, such as term restrictions on personal papers in manuscript collections. Consider that loans going outside of a country may face custom's inspections and delays. If this is a possibility, a custom's broker can be hired to ease the process. Items

made of specialty materials (animal hide, teak, ivory, etc.) may be subject to the Convention on International Trade in Endangered Species of Wild Fauna and Flora (CITES) restrictions. Furthermore, political or civil unrest in a country might be a reason to reject a loan request.

Specifications

- As the organization with title or custody of an item, the lending organization may make amendments or add terms to the Exhibition Loan Agreement per the organization's and item's needs.

- Establish the specific terms of exhibition, transport, handling, and storage for the item on loan. Determine if wall hanging or case display is more appropriate for the requested item. Provide specific terms for temperature, relative humidities (RH) fluctuations, natural light exposure, artificial lighting requirements, specific angles and types of cradles/supports, etc. Please refer to the *Exhibition Conservation* section of this document for more recommendations. Additionally, specify that the item will be displayed in an accessible manner while on loan. Please refer to the *Accessibility* section of this document for more recommendations.

- Consider all aspects of security while the item is on loan and in transit. This includes cameras, guards/staff attendants, fire alarms, burglar alarms, exhibit case security measures, and lockable/secured exhibition spaces.

- Determine how an insurance policy protects items while on loan and if the requesting organization's insurance policy will cover the item. Be prepared to provide certified appraisal values for items. Regardless, ensure there are no gaps in coverage and that the coverage is reflective of the item's value. Some insurance plans do not cover items while in transit, so a separate rider or temporary policy may have to be pursued. In the art world policies are designed to be "wall to wall" or "nail to nail". This denotes that the coverage is comprehensive of the item while in transit, in storage, and while on exhibition. Specify to the requesting organization that the certificate of insurance be provided before any object can ship.

- Establish a general handling and packing policy for items on loan. If necessary, specify that all items be packed by the lending institution's staff members, transported and handled by

designated people, and/or that items are returned in the same containers they were shipped. If specialty cases or crates need to be constructed, decide who will incur this cost. Photographically document, make notes, and refer to the item's condition report when packing and unpacking. This is a good practice for both lenders and borrowers.

- Consider how the lending organization would like to be credited for the item on loan in the exhibition copy and in promotional materials. Ask that the borrowing organization provide copies of the exhibition catalog so that these can be included in the organization's exhibition records documentation.

- Determine if the borrowing organization may photograph and/or duplicate the image of the item on loan. Exhibition is a practice of Fair Use (if in the United States), so imaging for exhibition purposes such as documentation is part of the act of exhibition. However, imaging for purposes of publication or social media use requires additional permissions and should be specified in the Exhibition Loan Agreement. Some organizations have separate departments and processes for image duplication and permission use.

- Require that the lending institution be notified immediately by phone or email of any damage or theft, and then request the incident be documented in writing (email or posted mail). Specify in the Exhibition Loan Agreement that borrowing institutions must comply with any ensuing legal or insurance investigation if damage or theft occurs.

- Specify that the borrowing institution does not alter or mark the item on loan or complete any cleaning or repairs.

- Specify the item not be exhibited or stored in areas where eating, drinking, or smoking is permitted. If there are special circumstances such as an exhibition opening with supervised food and beverage service in a gallery space, specify that staff be present to deter traffic away from the item and that the item is locked in a secured and sealed case.

- The handling of circumstances due to the borrowing organization's need to cancel, return, or extend a loan should also be specified in the Exhibition Loan Agreement.

Policies (COVID-19 Edition)

In early 2020, exhibition spaces around the world had to shut their doors in response to the global pandemic and many shifted to virtual access. Cultural institutions offered virtual exhibitions and tours, posted on Instagram, Facebook and YouTube, live-streamed events, shared podcasts, and utilized augmented reality in place of in-person engagement, in addition to other forms of education, entertainment and social connection. All libraries expanded virtual and phone services during the crisis, including digital content, online learning, and virtual programs, and development of new partnerships that supported the community.

In May 2020, an American Library Association (ALA) survey of U.S. libraries' response to COVID-19 found that most libraries closed access to their buildings while staff worked to establish health and safety protocol and processes for sanitizing and quarantining materials. Curbside pickup, delivery, and by-appointment services were the most common next steps as national, state, and local guidance evolved. Review the policies section of the bibliography for museum and library specific resources pandemic preparedness and response. Below are suggestions for policies related to pandemic or public health concerns.

Recommended Practices

- Establish criteria for closing the building and a plan to care for the needs of the facility while closed.
- Develop employee policies for sick leave, payroll, working from home, and provision of personal protective equipment (PPE).
- Ensure proper documentation of procedures or cross-training.
- Establish policies for social distancing while in the building.
- Establish criteria for suspending programming, and communicate clearly to all stakeholders when the criteria is subject to change.
- Develop standards for cleaning/sanitation.
- Establish a plan for communicating with staff and the public.
- Establish an action plan for how to continue to provide services for the community, such as digital reference and online resources and programs.

Additional Considerations for Reopening

As institutions make plans to phase-in reopening, it is critical to balance the safety of staff and patrons with access to physical spaces. Since factors impacting reopening will vary based on institution and location, ALA has developed a resource for individual libraries planning for reopening, including a planning checklist. During phased reopening, many institutions may limit capacity, making careful planning for spaces and the flow of people increasingly important. To avoid bottlenecks, exhibition spaces may consider adjusting practices for interpretation and experience, such as less wall text and labels. Remove any hands-on or touch components of exhibitions for the duration of the pandemic. Visitors may use the institution's website for more information and supplemental materials and programs, such as videos. The use of QR codes for exhibition content like brochures can minimize contact for staff and patrons. Exhibition design may adapt to allow extra space between items and viewers. Flexibility of spaces, such as movable walls and seating may be preferable. Many businesses, cultural organizations, and educational institutions have expanded their physical boundaries beyond the confines of walls and into the outdoors.

Exhibit Operations and Logistics

Conservation and Collections Care

Organizing and installing library exhibitions requires planning and actions to prevent damage to collections. The terms "conservation" and "preservation" can be confusing since they are used differently by various fields of practice. For example, the word *conservation* is widely used in environmental management, and the word *preservation* is often associated with saving historic buildings. In reference to library exhibitions, the American Institute of Conservation (AIC) definition of *conservation* is most relevant: "The profession devoted to the preservation of cultural property for the future. Conservation activities include examination, documentation, treatment, and preventive care, supported by research and education." AIC defines *preservation* as "The protection of cultural property through activities that minimize chemical and physical deterioration and damage and that prevent loss of informational content. The primary goal of preservation is to prolong the existence of cultural property."

Exhibition decisions should balance the public or scholarly benefit, potential risks, and loss of access to the physical item by library users for the duration of the installation. The level of care should be established based on the level of significance within the collection and the physical characteristics of each item to be displayed. Always follow the primary tenet of cultural heritage conservators, *do no harm* while remembering conservation interventions should be reversible.

Recommended Practices

Conservation Assessment

- Determine whether the exhibition space is able to provide a preservation environment appropriate to the needs of the types of materials to be displayed (completing **a General Facility Report** obtained via the American Alliance for Museums can guide this decision).
- Evaluate individual items to confirm that they can be protected from damage during exhibition preparation and installation.
- Complete a Condition Report when warranted for high value (monetary or significance) items to document any damages prior to and following the exhibition.
- Use facsimiles in place of rare and fragile items, when possible.

Handling and Transportation

- Specify the level of skill needed to transport, prepare and install items in the exhibition (special collections may require advice from a book or paper conservator).

- Remove any dangling jewelry, lanyards (especially with keys or passcards), belt buckles, and anything else that might damage items from impact or snagging.

- Cotton or disposable nitrile gloves should be worn when handling metals or photographs. Clean, dry hands are preferred for most works on paper and textiles (gloves may snag or impair dexterity).

- Clear a pathway and know where the items will be placed (on a cart or table) when they arrive at the exhibition space.

- Determine how to safely transport items to the site, whether it be an internal exhibit that requires carts or a traveling exhibition that requires items to be hand-carried or shipped in custom crates.

- Oversized works on paper require special handling to prevent creasing; lift from opposite corners. Transport large items on a support to prevent them from tearing under their own weight.

- There is an ethical responsibility to report any damages immediately to lenders or internal librarians responsible for individual collection items. If conservation treatment or other repairs such as reframing are required, written permission should be secured in advance of any actions.

Exhibit Preparation

- Use only low volatile organic compound (VOC) paints and allow to off-gas for two weeks before installation.

- Books, loose photographs, manuscripts and three-dimensional objects should be secured in a vitrine on a pedestal, a vitrine attached to a wall, or a standing display case to protect against handling and dust. High value materials may require use of locking cases or security screws.

- Fabrics and papers used to line display cases or otherwise in contact with sensitive items should be chemically inert and may warrant examination of Oddy Test results.

- Use a barrier (such as polyester film or acid-free paper) between items and casework.

- Book stands or mounts should be employed to safely position books and support spines of opened books.

- Matting photographs, documents, and other works on paper must be done in a clean space with proper tools. Mats should be designated as museum quality or 100% cotton rag. Photos and other lightweight items should be secured with archival corners and heavier items may require reversible hinges made with Japanese tissue and wheat starch paste (do not apply tape of any kind, including those described as "archival").

- Framing may need to be sent to a vendor if facilities are not available to cut and assemble metal or wood frames. Frames should be hung from a line on picture rail or on hardware such as picture hooks and wires designed to minimize damage to walls.

- Glazing for cases and frames can be glass or acrylic sheet. Glass should be used for friable materials such as charcoal or pastel on paper. Ultraviolet filtering material should be used for valuable light sensitive objects.

- Flattening folded or rolled items should be undertaken by or under the advice of a conservator. Rolled photographs are particularly at risk of cracking.

- Boxes or crates used to transport materials should be stored in a secure, clean, climate controlled environment to be used for the return of items.

Light
- All light is damaging including infrared, but especially ultraviolet (UV) light, and should be filtered through use of UV glazing, window filters, and shades. Minimize light exposure through a combination of limited duration exhibits and controlling light levels (consult a paper conservator for appropriate duration of display for paper related materials).

- LED lights emit less UV light and heat; thus they are preferable to incandescent and fluorescent. Modern fluorescent lights may be available with a UV coating; however, when not available, look for UV film cut in sheets to place in the fixture or sleeves for the bulbs.

- Display cases with lights should be avoided since they are difficult to filter and generate heat which can be damaging to a variety of materials.

- Lights should not be left on when the exhibit area is closed, except to allow for activation of security cameras.

Temperature

- Libraries are known for being cold,which is directly tied to preservation. Recommended temperatures for general collections are within the human comfort range of 68-70°F or 20-21°C. The upper limit for most library materials is 72°F or 22°C. Chemical deterioration accelerates at a higher rate above this threshold.

- Certain types of materials such as rare books, photographs and film may be stored at lower temperatures so consideration for the stability of an item needs to be weighed before moving them to a new environment.

Humidity

- Target humidity for general collections is often stated as 50% plus or minus three percent. The Image Permanence Institute has done extensive research to support sustainability and has found that most materials can tolerate a broader range from 40 to 60%.

- Humidity ranges above 60% should be avoided as they cause organic materials to swell and some molds can grow at humidity as low as 65%. Sustained humidity levels in excess of 70% will cause mold to grow and will accelerate at higher temperatures. Humidity below 40% may cause organic materials such as leather and cellulose in books to dessicate.

- Fluctuations in humidity cause expansion and contraction of hygroscopic materials such as paper and books, which can cause damage. However, be aware that many data loggers and other monitoring devices have an accuracy of within plus or minus 2 or 3% for humidity, meaning that a hygrometer displaying 63% could actually be 65% and still be within an acceptable tolerance.

Air Pollution

- Air quality is important for preservation of collections and human safety so good housekeeping and filtration on air conditioning is essential to exhibition maintenance.

- Gaseous pollutants can react with collection materials causing fading or chemical deterioration. No construction should be performed in the exhibition area for the duration of installation and de-installation.

Integrated Pest Management

- Strict food and drink policies in exhibition areas, along with controlling temperature and humidity, will reduce the likelihood of pest infestations.

- Potted plants should not be placed in the exhibition space to prevent introduction of insects from the soil or damage from watering.

- Focus on preventing infestations through housekeeping, monitoring, and a secure building envelope. Dust is abrasive and can provide a breeding ground for booklice and mold.

- Mold is damaging to all types of organic materials. Mold consumes the material it grows on, and it weakens the structure and causes staining. Mold should be cleaned by a conservation professional using personal protective equipment.

- Pesticides should not be used inside a building since they are damaging to people and collections. Pesticide residues should be cleaned by a conservation professional using personal protective equipment.

Documentation

- A record should be kept for exhibition history to limit the repeated exposure of the most important items to handling, light, and environmental changes.

- Create a list and photograph the exhibition after installation in the event an account for all items is needed quickly.

- Care must be taken to retain identification of items while on exhibit so they can be returned to their storage locations. Often rare book flags and twill tape with numbers or identifying folders for manuscripts and plastic sleeves for photographs may be removed for display, which can lead to dissociation of the number from the item.

Security

- Consider the level of security required for the items on display. Avoid leaving items unattended during installation.

- Small, portable items should be secured to the wall or in a locking display case. High value or otherwise irreplaceable collections may warrant a guard or other gallery attendant.

- Collections should be secured when the building is closed and may be monitored by an alarm system and/or video surveillance.

Emergency Preparedness
- Each institution should have an emergency response plan and staff trained to carry out the plan.
- Salvage loans first in response to a collection emergency.
- Water should be the focus of salvage training since it is the most common in libraries (roof leaks, broken pipes, mechanical equipment, condensation, flash floods, and natural disasters).
- Have a contingency plan in place in the event of extended air-conditioning failure or building closure. Consider at what point loans will be returned and items moved.
- The exhibition space should have smoke detectors or fire suppression systems.

Facilities and Physical Surroundings

Exhibitions are complex, and even modest exhibitions require the time, energy and expertise of many people. Libraries use a variety of exhibition spaces. Successful exhibitions can build a positive reputation for the institution and promote engagement with stakeholders and the community. Although some best practices for planning, organizing, promoting, and evaluating exhibitions must be modified to suit the needs of libraries, the general principles of facilities management apply regardless of the type or size of the organization. No matter how large or small an exhibit space may be, it should be well-designed, safe, and comfortable. In people-centered spaces, exhibitions are created in a way that considers the experience of the visitor, including their physical, intellectual, and social well-being. First impressions count and it is important to view the physical space of exhibitions through the eyes of visitors.

Recommended Practices

Facilities Management

Buildings and grounds should be clean and well-maintained and offer ideal conditions in which to experience the exhibition. The physical environment should be safe and comfortable for staff, visitors, and the items on display. Environmental systems, including electrical, water, heating, air-conditioning, ventilation, humidity control, and fire and security systems should be inspected regularly.

According to the American Alliance of Museums, professional standards for facilities management include:

- Good stewardship of resources.
- Commitment to providing physical and intellectual access.
- Compliance with local, state, and federal laws, codes, and regulations applicable to the facilities, operations, and administration.
- Allocation of spaces to meet the needs of the collections, audience, and staff.
- Appropriate measures to ensure the safety and security of facilities, people, and collections.
- Established program for the care and long-term maintenance of facilities.
- Risk management and emergency response planning.

Although the needs of exhibition spaces and collections will vary, institutions must provide proper storage and environmental controls, maintain accurate and timely documentation, and ensure proper intellectual control. With regards to collections stewardship, libraries should monitor environmental conditions and take proactive measures to mitigate the unwanted effects of ultraviolet light, fluctuations in temperature and humidity, air pollution, damage or loss, pests, and natural disasters. Each of these areas of concern can be complex and extensive in terms of choosing the right parameters and equipment and establishing an ideal and secure environment.

In exhibitions planning and implementation, a detailed **General Facility Report** is typically required from the borrowing institution to expedite the exchange of critical information to lenders and insurers. The report documents an institution's physical specifications and staff practices and should include:

- Type of building
- Access to the building and exhibition space
- Type of walls and floors
- Exhibition space
- Security
- Environmental conditions and record of climate control
- Staff

Risk Management

Risk management is an institution-wide effort to ensure that risks to people and collections are accurately identified and assessed and that appropriate methods and resources to reduce or eliminate the risk are available. Risk management means maintaining buildings and grounds, minimizing risk to collections, preserving collections for future generations, and ensuring the safety of staff and visitors. Thoughtful, proactive identification and documentation of the risks that could potentially damage buildings or harm people and collections, a comprehensive plan to mitigate areas of concern, and appropriate allocation of resources to reduce these risks are vital. There are three main areas of risk management: *facilities*, *collections*, and *people*.

Facilities

- Ensure the building is maintained and preventative maintenance is accomplished. For some libraries, responsibilities for facilities management may be assigned to the parent organization's physical plant department rather than controlled independently. In these cases, it is vital to communicate best practices to those responsible for these areas and ensure that funding is sustained.

- Use space wisely, which may be more challenging in buildings that were not purposely built for exhibitions.

- Keep the building and grounds attractive, safe, and accessible to visitors.

- For historic structures, the preservation needs of the building must be carefully balanced against risk to people and collections. Maintaining the most important and valuable asset of these locations, the site itself, is essential.

Collections

- Maintain a current, comprehensive emergency preparedness plan tailored to the institution's needs and specific circumstances.

- Implement a pest management plan.

- Draft and enforce procedures for the proper handling and storage of collections.

- Avoid the use of hazardous materials.

- Ensure the security of the collection(s).

- Carry an insurance policy for the collection(s).

People

- Hire a well-trained security force, perhaps including video surveillance, and a physical presence in the exhibition space.

- Properly train, develop and supervise visitor services staff, students, and volunteers. Offer security training and emergency preparedness drills for all staff and volunteers.

- Comply with local, state, and federal laws regarding access and safety.

- Thoroughly vet and supervise contract services vendors and staff.

Exhibit Administration

Community Engagement, Marketing, and Outreach

Community engagement, marketing, and outreach efforts are often intertwined when creating library exhibitions. Community engagement focuses on forming relationships with particular local groups. Marketing often highlights the institution, library, or department as an entity that has value. Outreach emphasizes the library's active pursuit of connecting with external groups. Educational programs and events provide community engagement and offer marketing opportunities. Collaboratively developing library exhibition marketing material with an external group directly fosters community engagement and can be considered outreach. Alternatively, marketing can stand alone as a communication strategy that supports outreach and community engagement initiatives. All are collaborative efforts that may include library staff, exhibitors, additional departments, and external organizations.

The following recommended practices are meant to be adopted and applied in ways that best fit the specific needs of the type of institution with the understanding that staff resources vary across libraries.

Recommended Practices

- Obtain support from administrators.
- Provide clear key messaging for library staff to communicate and promote the exhibition, especially staff in public service positions.
- Begin marketing at least one month in advance, and use multiple methods to reach wider audiences. Create marketing material in multiple languages to reach broader groups in the community. Include marketing in the overall exhibition project plan as this can improve attendance and overall perception of the institution. Some ideas include putting ads in local papers, hanging posters in the library and community, printing eye-catching promotional postcards and placing them at the service points in the library, and hosting events leading up to the exhibition to generate interest.
- If marketing via social media outlets, identify the social media preferences of the targeted audience. Create policies regarding social media posting. Develop a social media management plan and minimize the frequency of social media posts. When sharing information about the exhibition on social media, consider highlighting what is unique or

interesting in the exhibition. Link social media sites to the library website, and regularly monitor social media posts. Be sure to format advertisements for screen readers.

- Consider programming that allows visitors to engage with staff involved in the execution of the exhibition or to engage with augmented reality technologies.

- Host conversations with representatives from local community groups, business, and liaison areas to better understand their interests and what type of exhibition programming they would like to see the library provide. These community contacts can help with promoting the exhibitions through their own networks. Such conversations and contacts with different internal departments or external organizations may lead to future partnerships and collaborations that foster community relationships and broaden impact.

- Create bibliographies or reading lists that support organization-wide exhibitions with the library's related collection resources.

Documentation

Exhibitions can be scholarly endeavors, marketing tools, and effective learning tools. Few other operations of a library can make such a claim. Preserving the record of exhibitions is part of an organization's institutional and operational memory and should be part of regular record-keeping procedures. A failure to document exhibitions may contribute to a lack of organizational support for exhibitions, a lack of patron awareness about exhibitions, and overall professional misconceptions about library exhibition efforts.

Recommended Practices

- Exhibition documentation is a critical internal workflow and may not be included with a public facing exhibition policy. Determine the best approach for adding documentation procedures to the exhibition workflow. Exhibition documentation practices should be part of job description language for every staff member with exhibition responsibilities, preferably any individual that is a designated professional level full-time exhibition technician, planner, or librarian. Staffing levels and exhibition commitments vary by organization, but basic documentation practices can be easily adapted.

- Maintain a database of the organization's exhibitions and make it accessible to other related staff members. This record can be part of a larger organizational database system or a separate database unto itself. Include documentation pertaining to the exhibition's proposal, images, planning, financials, attendance statistics, related events, copy for text panels and individual labels, digital files of marketing materials, security and conservation notes, and loan agreements. If items from collections are used in an exhibition, document the status and the duration into the database used for managing the organization's collection.

- If an exhibition catalog was created, retain at least two copies physically and/or digitally.

- The record of exhibitions and all accompanying digital files should be maintained using a secure and shared method in a location that permits consistency in times of staffing transitions. Aim for completing the documentation cycle as soon as the exhibition is over or do so within a year after the exhibition to avoid any lag time which may potentially lead to missing documents.

- Photograph multiple views of the installed exhibition. Ensure every item in the exhibition is captured from multiple viewpoints. Photograph the installation and deinstallation of items on loan. For archival purposes and overall versatility, digital images should be captured at the highest resolution and bit depth possible in a JPEG, TIFF, or PNG format. Create a basic metadata schema for digital images. Store digital images in compliance with secure digital storage practices. It may be necessary for organizations to add a line to the budget for a professional photographer with experience documenting exhibits if in-house staff can not complete this task.

- Digital images can be used for marketing or digital exhibition purposes as well. Copyrighted materials should be captured in exhibition views rather than featured individually. If an item is on loan ensure imaging for promotion is part of the lender agreement. With promotion in mind, capturing images of people viewing the exhibit provides scale and "humanizes" the exhibition. Obtain release agreements if images of patrons are to be used for promotional distribution in print or digitally.

- Determine if physical, printed promotional materials for exhibitions are to be preserved. If so, adhere to archival and/or record retention workflows. Physical ephemera, such as individual exhibition labels, from all exhibitions may not be deemed worthy of retaining. Develop a policy to assist staff with determining what ephemera and/or digital surrogates will be retained.

- Store all documents and records concerning exhibitions in a secure repository.

- To maintain consistency and regularity of documenting exhibitions, include the scope and logistics in exhibit policies. The policies may be revised and subject to change in response to any evolving situation at the institution.

Evaluation

Evaluation offers the ability for staff to examine the goals of the overall exhibition and determine its effectiveness and value. There are various methods libraries can use for assessment including qualitative, quantitative, or a mixed methods approach to gather information from stakeholders. Qualitative research methods broadly examine the "who" and "what" while quantitative captures the amount or number, such as foot traffic. The benefit of evaluation allows for the library to help advocate its story while also providing staff data-driven and evidence-based feedback on how it can improve future exhibitions.

Suggested methods to gather information and assess an exhibition are based on library exhibition literature, research methods, and industry leaders in user experience research. Whichever method a library chooses, it should be based on both the research question as well as grounded in the realities of how much time is available to library staff to conduct an evaluation.

Recommended Practices

The evaluation of an exhibition should be embedded in the exhibition plan from the start of the exhibition life cycle. Consider how and when feedback could be gathered when developing an exhibition's theme and goal. Collecting feedback from exhibition to exhibition also provides the benefit of a team to use iterative design to continually improve all aspects of the exhibition life cycle.

When developing an exhibition, consider what the institution would like to learn from the evaluation. In terms of exhibition success, consider what criteria would constitute a successful exhibition, such as increased foot traffic, increased online engagement, or more positive feedback from visitors or exhibition partners. Once a research question has been developed, a suggested method may be useful to help gather the information needed to answer the question. Some methods may require more effort on the part of the institution. Different methods of evaluating exhibitions follow.

Quantitative Methods

A library may choose to look at the metrics available to them. Statistics may be used to showcase the success of an exhibition's space, such as increasing visitor numbers over time. It should be noted that metrics can only provide one perspective of an exhibition's success and will not fully capture

everything an exhibition has achieved. Quantitative methods for gathering metrics can include the following:

- Count the number of people who attended the exhibition, exhibition event, or visited the digital exhibit.

- Determine the change in the number of visitors over time, which may be useful in assessing the success of marketing or outreach efforts.

Qualitative Methods

Compared to quantitative, qualitative methods may require more staff time to analyze and pull actionable information. Qualitative methods for gathering information may include the following:

- Gather feedback from stakeholders, such as visitors, artists, partnering organizations, and staff. This may be done in the form of a physical or digital comment book, open-ended questions in a paper, or an online survey.

- Observe and note how visitors move through the space and what captures their attention.

Mixed Methods

The library may choose to examine both the metrics available to them as well as conduct qualitative research to obtain a more holistic response to their research question. A survey, for instance, may include quantitative and qualitative questions, such as a rating and comment of the visitor's overall enjoyment of the exhibition.

User Experience Research / Usability Tests

User experience research examines the holistic interaction of a user with a product, service, or company to design the ideal experience. This method focuses attention on the user's experience and may allow for rapid investigation and iteration for an aspect of the exhibition life cycle. The user experience research method may be useful to those with less staff time available, particularly as an abundant amount of guides and suggested activities may be found in both academic and industry resources. Below are a sample of possible user experience research activities:

- Host focus groups. Class tours may be brought in to learn about an exhibition but may also be used to learn about what worked well and what could be improved.

- Conduct usability tests to examine the web content related to an exhibition.

- Offer a short survey that requests pointed feedback from different stakeholder groups. Consider asking questions about topics that are assumed known, such as expectations, the physical space, outreach, or any other topic related to the exhibition life cycle.
- If time permits, create a low-fidelity prototype of an exhibition. This may be used to test among a few users and/or allow the exhibition team the opportunity to design the space ahead of time. Low-fidelity prototypes may allow for issues to be found before significant staff time is spent on developing the web site or installing the physical exhibition.

Financial Management

Financial challenges affect the availability of resources for exhibits, exhibition space, dedicated staff, and the scope of exhibitions. It is vital that administrators acknowledge and support the efforts that go into exhibitions. The overall workload associated with exhibition management should be assessed regularly and balanced.

Recommended Practices

Financial literacy of exhibition staff, whether they are curators or librarians, is a key first step in exhibition budgeting. Institutions vary widely in the approach to fiscal procedures. It is important to include exhibition staff in the budgeting process to balance the scope and feasibility of exhibitions and to ensure an adequate budget is established to realize the project. Some factors to consider when studying the financial landscape at an institution follow.

- Consider how specific costs are funded. For example, publicity may be included in budgets for exhibitions or may be included in a separate marketing budget handled by another department. At some institutions, exhibitors are solely responsible for funding all costs associated with the exhibit, including shipping, installation, publicity, and insurance.
- Consider what funding sources are available (e.g. revenue, donations, endowments, grants) and how the funds are applied to the exhibition budget. Budgets should contain detailed funding sources as well as expenses the exhibition will engender.
- Determine other potential funding sources and strategies, such as partner organizations, corporate sponsorships, and in-kind services. Diverse sources of income will minimize the impact of any potential funding cuts. Keep in mind that successful fundraising depends on having a well-developed and intriguing exhibition proposal, including a sample budget.
- Determine if exhibition budgets follow the fiscal year or if available funds roll over from year to year. Complex exhibitions may require many years to prepare so it is important to understand budget timelines and deadlines. The relationship between the exhibition schedule and budget cycle should be considered to ensure that funds are available when needed.
- Know how and when budgets are approved and by whom. Exhibition staff should be part of the budget's approval process and share the curatorial vision for proposed exhibitions, including goals, loans, timeline, installation, and key components without which the show is

no longer feasible. Communicate openly and clearly during these early stages to avoid surprises and misunderstandings later.

- Remember that a budget established during the early, feasibility phase of exhibition planning will be inexact. The estimate is meant as a guide to establish exhibition costs based on a project's density, complexity, and types of displays proposed. A 10-15% contingency factor for unknown items is recommended.
- Potential areas of costs to consider when planning an exhibition include the following:
  - Travel and research.
  - Curatorial and fees for the exhibition, if applicable.
  - Administrative fees and labor, including contracted services, in addition to staff.
  - Exhibition contents/objects, including loans, packing and shipping, and insurance.
  - Installation, including fabrication and object preparation.
  - Technology or technical support for digital exhibits, including software and hardware
  - Educational/interpretive, such as graphics and didactic materials, and rights and reproductions.
  - Programs and events.
  - Publications and catalogs.
  - PR/Marketing, including advertising, website development, and photography.
  - Security and environmental control.
  - Miscellaneous/contingency to cover unknowns, especially if trying something new or with a degree of complexity.

Finally, to properly plan and make the most of available funding, it is important to develop strategies for estimating and predicting costs. Strategies include some of the following:

- Examine historic institutional and project data.
- Gather quotes from multiple vendors and compare prices.
- Request assistance from the finance office.
- Talk with colleagues at other institutions for recommendations or preferred vendors.
- After an exhibition closes, compile final figures to track actual costs. It will be helpful to compare these to the estimates when planning for future exhibits.

Conclusion

As libraries and research materials become more easily accessible online and ubiquitous, archives, special collections, and museums will continue to offer primary sources, subject-specific research materials, and unique collections. Through physical and digital exhibitions, stewards of these one-of-a-kind collections will increasingly need to demonstrate uniqueness in order to maintain relevance and to ensure collection preservation for future generations. It is essential that library professionals and other stewards of collections become experts in revealing collections' distinguishing characteristics, significance, and local history. The ARLIS/NA Exhibition Standards Task Force believe that increased discovery of these unique collections is possible if librarians, archivists, curators, and museum professionals who create exhibits (physical and digital) are guided by widely accepted, recommended practices.

Please direct any comments and questions about the document to info@arlisna.org.

Appendix A: Background of Best Practices Development

The ARLIS/NA Exhibitions Special Interest Group (SIG) was formed in 2017 as a result of a growing interest in library exhibitions among art librarians and related information professionals. Since then, the SIG hosted a number of virtual meet-ups such as author talks and panel discussions to explore various issues facing art librarians and alike. What emerged from these conversations was an agreement that there had been a lack of industry-wide standards dedicated to library exhibitions. While there was literature relating to producing and staging exhibitions, it was inadequate and not grounded in the library context.

In response to the heightened awareness of the importance of exhibitions in library services and the need for related best practices, in May 2020, the ARLIS/NA Exhibitions SIG created an Exhibition Standards Task Force (ESTF) to produce industry-wide recommendations for library exhibitions. The first meeting was held in August 2020.

Our Methods

In November 2020, the ESTF created a forty-one question survey to gather information that contributed to the development of the standards. The survey was distributed to the ARLIS/NA email list-serv. Participants were asked to answer the survey to the best of their ability within the context of their current exhibition practices and procedures. After allowing for a four-week response period, thirty-one ARLIS/NA list-serv members responded to the survey, which represents <.01 of the total list-serv population. While this response group does not represent a statistically significant number of the total list-serv population, the ESTF believes that the 31 respondents represent a convincing number of list-serv members who are responsible for work related to the exhibition of their organizations' collections.

The survey was broken down into several sections that included:

- Participant's role and institution;
- Participant's collection and staff;
- Exhibition planning: Internal;
- Exhibition planning: External;
- Exhibition selection, criteria and audience;

- Diversity, equity, and inclusion in exhibitions;

- Exhibition funding;

- Physical exhibitions;

- Digital/virtual exhibitions;

- Exhibition outreach and marketing;

- Exhibition conservation and installation;

- Exhibition policies;

- Exhibition assessment; and

- Professional development.

Despite minimal participation in the survey, the ESTF believes that the respondents adequately represent the community of ARLIS/NA members, specifically the subgroup of members whose occupations require the planning, curating, installation, and programming of/for exhibits. The survey results revealed an overwhelming need for guidelines to assist professionals responsible for all aspects of physical and digital exhibition of collections. The ESTF gleaned sufficient information that greatly assisted with the development of recommended practices for exhibitions in libraries and other closely related professions. After approximately nine months of discussion, research, and organization, the group produced a draft document of recommendations for library exhibition practices. Please refer to *Appendix B: Interpretation of Survey Results* for the summary and interpretation of the survey's results.

During the ARLIS/NA's virtual conference in May 2021, four representatives of the ESTF (including Allison Comrie, Kristi Kohl, Elizabeth Meinke, and Carol Ng-He) presented a session on the process and methodology that were used to inform the creation of the best practices. Additionally, these ESTF members offered the same presentation in a pre-recorded, on-demand session during the annual conference of the Society of American Archivists (SAA) in August 2021. A live, online Q&A session was also offered during the SAA conference.

By sharing the draft document and the work in progress, the goal of the presentations was to engage special collections librarians, archivists, art librarians, and other stewards of artifacts and rare materials in thinking about a wide array of topics concerning the planning and execution of exhibitions that could be applicable to their own setting. These topics range from exhibition

philosophy and policy, curating, the use of digital technology, issues of diversity and inclusion, facilities considerations, conversation, marketing, financial, and evaluation. By hosting an open forum with the conference participants, the ESTF continued to refine the best practices in advance of final publication on the ARLIS/NA website—with a target release date in fall of 2021.

Appendix B: Interpretation of ARLIS/NA Survey Results

A summary and interpretation of the results gathered from the survey distributed to the ARLIS/NA list-serv in the fall of 2020 follows.

Exhibit Creation

Curation and Policies

Survey results revealed many institutions have policies or are in the process of editing policies. Some institutions make policies available to the public, while other institutions keep policies as internal working documents. Survey participants were encouraged to share/upload policies across which commonalities were noted, although each policy had its measure of focus. Survey respondents indicated an exhibition planning template would be useful and would align with an exhibition policy document.

Depending on staff size, resources, and institutional support, librarians either work alone to determine which exhibitions to mount or work on an inter-departmental committee that votes or provides support for exhibitions. Librarians typically work closely with an internal or external exhibitor or artist to work out conceptual details, though libraries frequently rely on exhibitors to physically install the exhibition materials.

Survey participants listed a variety of criteria used to determine which exhibitions to support. Criteria includes mission of the institution, relationship to collection subject areas, interest to staff, students, faculty and community members, and particular applicant and exhibitor. Some institutions specifically listed the kinds of materials or curatorial ideas they would not consider. These areas overall provide a variety of useful viewpoints when considering exhibitions, though it was noted that none of the participants selected all criteria. Of the policies shared, only one stated ethical concerns.

The methodologies for planning exhibitions provided by survey participants included a statement regarding a deadline for an application (usually listed: X months before proposed exhibition or on a rolling basis); exhibitor picks dates and/or duration of the exhibition; a general timeline for installation, duration of exhibition, and de-installation; and the possibility to refuse an exhibition if an installation timeline is not met.

Survey participants indicated that institutional policies often did not communicate the general exhibitions calendar such as how many shows per year, and none provided potential open dates but requested the exhibitor pick the dates for the exhibition. Only one policy mentioned what would happen if the exhibition wasn't installed by the agreed upon date. In this section there was inconsistency between libraries' stated typical calendar and timeline for exhibitions versus published policies communicated. Considering that several survey participants stated policy templates would be useful, libraries may have limited resources and staff to devise and promote an exhibition calendar with consistency or annual commitments.

Most libraries use an online application form/application to gather exhibit proposals. Some provide a form for exhibitors to complete, some requested a concept statement, and some conduct the exhibition application process entirely through email. The proposal process for potential exhibitors could be streamlined if expected details (e.g. dimensions of works) are provided before the exhibitor begins completing the application. According to the ESTF survey results, each institution votes on potential exhibitions in different ways such as by group or committee vote or by an individual library staff person. Some shared applications and policy documents did not reference any voting criteria.

Most libraries seemed to provide support to the exhibitor in a limited manner, relying on the exhibitor to do the following: install and de-install the exhibition; create all text related to the exhibition; provide titles and dimensions of art works; provide a price list; and market the event through openings, additional programming, or social media. Some libraries preferred to add titles and placards, while others allowed the exhibitor to request minimal help from library staff during the installation and de-installation process.

With the exception of one library, no survey participants indicated their libraries include information about funding as it related to travel, shipping artworks, or installation costs. Most library participants did not provide marketing or promotional support; however, some indicated support was minimal. Some policies state that the exhibitor is responsible for promotion. Furthermore, some libraries allow exhibitors to arrange events in the space. For libraries that do provide support, it is limited, typically provided by the library's marketing department and primarily only offered if requested by the exhibitor.

Most shared policies clearly state that the exhibitor takes on all liability, including any damage to the exhibition space. Few libraries mentioned institutional responsibility, and only one noted that security is provided in the gallery space.

The size of exhibition spaces, number of exhibition spaces, and hours of exhibition space(s) are not well documented by libraries. Moreover, information regarding the installation space or mounting preferences (e.g. wall mounting, display cases, tabletop) was limited. Shared policies failed to include conservation or preservation standards, such as the type of lighting available or whether or not the use of acid free materials is implemented. One policy mentioned accessibility, noting the exhibitor is responsible for making the space accessible although no specific guidelines were included.

One library's policy that was shared mentioned having the right to document exhibitions. Another library's policy linked to past exhibitions on the institution's website. Communication regarding potential documentation of exhibitions as part of the institutional archive should be conveyed to exhibitors early in the application process. Additionally, providing information in print or online provides patrons with another form of engagement with collections and exhibitions.

Digital Exhibits

While the majority of respondents (90%) indicated they offer digital exhibits to supplement their in-person/physical installations, only 39% (12) indicated they develop digital surrogates of their physical exhibits. One-third of respondents indicated their institutions offer digital exhibits *instead* of physical installations. Of this group, 90% (9) of respondents indicated the COVID-19 pandemic in 2020 was a catalyst, and half suggested their institutions were already working toward digitizing collections for online display. Surprisingly, only 17% of total survey respondents indicated their institutions were planning to create/initiate virtual exhibits prior to COVID-19.

Seventy percent of respondents who indicated their institutions offer digital exhibits use an open source platform (e.g. Omeka) while the remaining 30% use a commercial/paid option (e.g. CONTENTdm, SpringShare). A couple of institutions use Google or YouTube. None of the respondents indicated they use a photo-sharing option or home-grown technology.

Survey results suggest that nearly half (47%) of the respondents feel that the staff dedicated to exhibition-related work is inadequate at their institutions. Furthermore, 36% of the same respondents indicated that between 4-10+ staff would be an appropriate number of staffing.

Factors not incorporated in this survey that should be considered for digital exhibitions include the use of sound, film, interactive capabilities, and the use of responsive web design for mobile engagement. Furthermore, designing the user interface with user experience principles should be a priority. In addition, noting intellectual property rights and fair use of digital content should be addressed. In a future survey, it might be worth asking more specific questions in order to differentiate institutions' use of digital exhibits as supplemental to physical exhibits and/or digital surrogates of physical exhibits.

Diversity, Equity and Inclusion and Accessibility

The ARLIS/NA ESTF survey included two questions related to diversity, equity, inclusion (DEI) and access. Over three quarters of the survey respondents (24) indicated they include DEI strategies into display and exhibit planning. Some examples of how institutions incorporate DEI perspectives offered by survey respondents include: representation of diverse contributors and content; consideration of online and in-person accessibility standards; provision of label text in multiple languages; consideration of sensitivity of historic content; representation of diverse historical narratives; showcase of campus history; and promotion of events through their institution's Office of Diversity and Inclusion. A small number of respondents indicated there was a lack of support from administration in regards to accessibility standards. DEI strategies were not included in one respondent's exhibition planning; however, they indicated future planning for exhibitions and programming will include DEI strategies.

Future surveys should ask more specific questions on DEI and Access strategies in order to allow respondents more opportunity to provide examples within each of these topics. More explanations and examples would offer much needed clarity due to the complexity of each of these areas and the various ways libraries are including DEI and Accessibility strategies in exhibitions, both physically and online.

Loaning

The ARLIS/NA ESTF survey asked participants if their organization loans or borrows materials for exhibitions and, if so, is there an exhibition loan policy in place. Of the survey respondents, 79% indicated their institution has a loaning policy. This is reflective of an environmental scan conducted in March of 2021 of library exhibition loan policies available on institutional webpages and loan policy practices of cultural institutions. Many libraries, including large independent institutions, government collections, or university libraries have publically available exhibition loan policies. Not surprisingly, higher profile organizations (size, collection stature, funding) had more comprehensive policies similar to museum loan practices.

Policies (COVID-19 Edition)

Surprisingly, less than 17% of total survey respondents indicated their institutions were planning to create or initiate virtual exhibits prior to COVID-19. However, 42% of the survey respondents indicated they would be interested in learning more about digital exhibits through professional development opportunities, demonstrating a desire to continue expanding library activities and engagement beyond physical spaces.

Exhibit Operations and Logistics

Conservation and Collections Care

Respondents were split nearly equally in regards to whether or not their organization has access to conservators with 52% indicating "Yes" and 48% indicating "No." Ninety percent indicated full-time staff are responsible for exhibit installation with 32% indicating student workers/interns assist with installation. Significantly less respondents identified part-time staff (10%), volunteers (10%), and contractors (7%).

Future inquiry should define "access" to conservators, specifically whether or not conservators are on staff at the institution, if conservators are contracted, the types of work the conservators perform, and how frequently the conservators are used. Overall, it is recommended that conservators be consulted when considering exhibition of fragile and irreplaceable items.

Facilities and Physical Surroundings

In the ARLIS/NA ESTF Survey results, all (100%) respondents indicated their institutions offer exhibits in display cases, while only 65% (20) offer 2-dimensional hanging installations. Less than half of respondents (48%) install 3-dimensional displays or pop-up exhibits. Other types of exhibits include digital exhibits, performance art, interactive installations, tabletop displays, and films/videos.

Exhibit Administration

Community Engagement, Marketing and Outreach

A majority of respondents (75%) said that their institution provides programming and/or educational materials/resources related to their displays/exhibits, whereas a majority of exhibition policies noted that programming and marketing is the responsibility of the artist or exhibitor. Some institutions have clearly defined roles that function in these areas or library staff have community engagement and outreach as a part of their typical library duties.

Institutions use both digital and print materials to communicate their exhibitions and any programming related to them, though social media was the most popular method. Only one institution noted that they used all materials. The methods used by libraries to market are dependent on funding and whether materials are paid for by the library or a separate department. Some survey respondents indicated libraries communicate through methods that they know will reach their library users, while some libraries choose various methods to reach different populations. Libraries also seem to decide which communication style is best based on library staff expertise and available training

Documentation

The survey asked participants if their department or organization documented or recorded physical exhibits. Nearly a quarter of respondents reported their organization does not document or keep a record of exhibitions. Two-thirds of the survey participants reported their organization photographs exhibitions and retains captions and promotional materials used for exhibitions. One-third of respondents reported their organization creates an online version or digital surrogate of exhibitions. Seven participants provided fill-in answers specific to their organization's practice of documenting exhibits. These responses included: "save posters, other related texts," "spreadsheet inventory,"

"track materials used in an exhibit," "archive physical promotional materials," "photo documents," "keep statistics of how many exhibits," and "save digital versions".

Evaluation

The results from the survey indicate a lack of formalized evaluation used by institutions to determine the success of an exhibition. Most determine an exhibition's success by the number of attendees, followed by reviewing comments offered in a box or guest book, analyzing patron surveys or counting online views. A significant number of responses indicated no type of evaluation is conducted on their institution's exhibitions. While some institutions attempt to gather feedback and evaluate exhibitions, most institutions implement less structured approaches to gathering data related to an exhibition.

Financial Management

Of the total survey respondents, less than 20% indicated their institution has a dedicated budget for exhibits and associated events. Funding covers expenses associated with display and promotional materials, staffing, and speaker stipends. Future surveys might consider inquiring further about how these funds are appropriated (e.g. endowment, operations budget, etc.) and allocated.

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