May 21, 2009, 10-11 AM: Introductory meeting (w/ Nicole, Stephanie, Hugues)

- Museum staff of 40ish, not including security, guides, and volunteers
- Two major units within the museum (recently went through some reorganization):
    - Collection – research and program
        - Collections unit (concerned with content)
            - Conservation
            - Research
            - Collections management
        - Programs unit
            - Exhibitions
            - Education
            - Multimedia (education and multimedia recently merged)
    - Additional departments
        - Human resources
        - Security
        - Development
- Some visitor statistics
    - 80,000-100,000 visitations/year (combination of regular visitors, and people using rented space)
    - More realistically, 65,000 paid visitors/year
    - ~16,000 students/year
    - Used to have day camps for students during the summer (not anymore, because of cost issues)
- Digital initiatives
    - Website started as a project of collections management (12 years ago)
    - 20 years ago (1988), built software for CMS with CHIN
    - Educational activities happened both within the online and physical spaces
    - In the process of integrating resources
- 1996/7: highlight of the museum's collections was put up on the web (~500 images)

May 21, 2009, 1-2 PM: Head of exhibitions (w/ Genevieve, intern, Nicole)

- Genevieve Lafrance: head of exhibitions
- Roles and responsibilities:
    - Makes sure exhibitions get done on time and on budget
    - Exhibition programming; what are the upcoming exhibitions, what are we offering to the visitors in the next year
    - Gantt chart-like time table, "exhibition production calendar", to schedule various exhibitions throughout the year(s) and permanent exhibition rotation
    - Preparing new labels, object conservation, etc. need to be managed
    - Planning for traveling exhibitions
- Outdoor photography exhibition on McGill College:

    - Trying Anaglyph this year
    - How they came up with the idea: 2 years ago, thought it would be great to see old photos in 3D
    - Started with the idea of using the images in a different manner
    - Settled on anaglyph for this year
    - Have made many prototypes and posters
- Being Irish exhibition:
    - Unusual because of the short amount of time they had
    - In the past years, designed exhibitions in-house, which no longer happens (budget cutbacks)
    - Give the designer the concept with how they see the exhibition structured, basically telling a story. What the objectives are, what objects you've selected to be part of the exhibition express your thoughts
    - These ideas are delivered in the form of scenarios and storyboards
    - Exhibition production calendar
        - PM develops the calendar (Gantt chart)
        - Graphic design 2D and 2D
        - Museum deals directly with printer
        - GSM (design company) took on the design but were hired to be responsible for the production as well. That is hiring the builders and printers to execute their plans. This was an unusual case, as the McCord usually prefers to oversee the production themselves.
- Some objects in the exhibition need to be rotated every so often for conservation purposes
    - E.g., paper and fabric needs to be changed often (if you go by the rules, paper needs to be rotated every 16 weeks)
- Exhibition design process:
    - Start with concept, text, word document (curator/guest curator if there isn't the specific expertise in house)
    - Educators, marketing person. A lot of rationale and angles need to be thought of to decide when and where do you place an exhibition in the exhibition calendar (e.g., summer vs. winter: in the summer, more tourists, in the winter, more students)
    - When everyone is comfortable with the concept, move to preliminary scenario. Start structure idea. How many themes, sub-themes, how do I flesh out the ideas. Start attaching objects.
    - Discussions with the designer. Concept + images
    - Final scenario: overall objective, for whom the exhibition is designed (e.g., children, secondary school students, general public), general themes, highlights of the artifacts, where and how they would be displayed
- Exhibition design process (step-by-step):
    - Idea
        - Developed over many years (the entire process can take years)
    - Concept
        - Roughly two page document

    - Preliminary scenario
        - Usually developed over about two years
        - For the “Being Irish” exhibit, took six months; this was an exception
    - Preliminary design
        - Talks about atmosphere, defines general design ideas etc.
    - Final scenario + bible
        - Scenario: ~100 pages document
        - Object bible: ~200 pages document
            - Exhibition report on the objects and images to be reproduced to be used in the exhibition
            - Also includes where the object are currently located, their dimensions, a picture
            - Used by the exhibition designer, technicians
    - Final design
        - E.g. of design consideration at this point: will the text from the final scenario fit?
    - Execution
- Documents Delivered throughout the Exhibition Design Process
    - Preliminary design: look-and-feel document
    - Final design: for “Being Irish”, GSM creates the design document to go with the floor plan
        - Discussion about where each artifact will fit, text sizes, etc.
        - Acme (in charge of constructing the exhibition elements) came to install the exhibition “furniture” space,
        - Once the exhibition furniture is in place, the museum’s technicians place the artifacts in the exhibition (for which they have conceived and prepared made to measure supports) and do the lighting.
    - Calendar: created/used by PM.
    - Exhibition report (aka, “the bible”): list of objects, accompanies the final scenario
        - Has pictures, location within the exhibition, and details of each object
        - Used by designers and technicians (prepare supports, install the exhibition, putting artifacts in showcase, build structures, etc.)
        - Also lists the rotation artifacts
- Scenario:
    - Contains:
        - Zones
        - Summary
        - Objectives
        - Atmosphere
        - Scope
        - Means
        - Sub-zones: table with artifact, message, medium (artifact, technology), content, images, audio-visual component, etc.

    - All of the artifacts in the exhibit are listed here
- Preliminary vs. final scenarios
    - Preliminary: final scenario long process of fine tuning
    - Stakeholders involved: conservator, curators, director, marketing, educators, etc.
    - "Being Irish" took six months for the production phase, the research phase was mostly completed beforehand. GSM handled third party partners (exhibitions usually take two years to prepare)
- Map floor/plan
    - Zone numbers on the map corresponds to ones in the scenario
- When they had an exhibition designer in house, McCord would deal with contractors directly through the in-house designer
    - Exhibition designer was responsible for the preliminary and final design documents
- With the "Being Irish" exhibition, they dealt with one contractor (GSM), who managed all the subcontractors
    - GSM created the design documents
- The path from preliminary to final scenario is full of meetings between the director, curators, conservator, and designer, project manager
    - E.g., conservator might say that a particular object is not in good shape, and that they need to find another object
    - E.g., director might not like the message from a particular idea
- On the website, they get a lot of feedback, giving them the ability to see how their website is performing for users
    - But this isn't so for exhibitions
    - Looking into possibly doing this in the future
- Some other institutions conducted public forums and other queries before the exhibition to get a sense of public interest, depending on the exhibit is about (e.g., Montreal Science Centre queried the public before the Body Worlds exhibit)
- For the "Being Irish" exhibit, they did ask a number of people what they knew about Ireland
    - Predominantly within the staff though
    - Barely knew where Ireland was
        - Thus, they knew they needed to show a map at the beginning
    - Also knew they needed to give the visitor some basic initial information
- On the website,
    - They don't show objects that don't belong to the museum (hence, they only show a "selection" of artifacts)
    - For the "Being Irish" exhibition, most of the artifacts were from outside the museum
    - Objects that are loaned still go into the TMS, but just as a reference
- Exhibition design process is not redone for rotating objects
    - They're not revisiting the themes, etc.
    - Just replacing an object with another object of similar size and subject
    - If they're really-really stuck, they'll just reproduce the object (e.g., photocopy/ photograph)

    - If they know the exhibition will be on for a long time, they'll describe replacement artifacts in the bible

May 21, 2009, 2-3 PM: Head of collections management and chief conservator (w/ Christian, Anne, Nicole)

- Christian Vachon: head of collections management
- Manages the museum collection with a team
- Handles acquisitions, from start (e.g., preparing documentation, etc.) till finish (i.e., until it's legally theirs and in final storage)
    - Curators come up with rationale for acquiring object
- TMS catalogues all their objects
    - Makes sure all items are fully described ("when, where, and how")
    - Where the items are; e.g., in storage? If so, where in storage?
    - Including where the items are if they're taken out of storage for more than a week or so
- Handles object loans
    - Both incoming and outgoing
    - Makes sure insurance, contracts, shipping, etc. are all in order
    - Makes sure certain criteria are met
- Photographing
    - Object photographs are all stored in TMS (and linked to the objects)
    - Holds various sizes of each photograph; largest are roughly 20-24 MB
    - Larger sizes stored in DVDs
- Manages relationship between objects
- Designs reports (e.g., the bible used in the exhibition design process)
- Various data fields for the objects:
    - Artist, artist occupation
    - Object name
    - Object type
    - People involved: donor, source, maker/designer
    - Mediums
    - Techniques
    - Dimensions
    - Location
    - Description (physical)
    - Image (linked)
    - Travel condition
    - Condition reports
    - Acquisition reports
    - Label text (interpreted)
    - Exhibition history (for outside the museum)
    - What exhibits its been part of (link)

    - Origin
    - Geocultural
    - Period
    - Culture
    - Historical attributes
    - Exhibition history
    - Published refernces
    - Provenance
    - Credit line (donor information, gift/etc.)
- Manages security of the TMS
    - Visiting researchers don't have full access to the TMS
    - Important because you don't want outsiders to know the location of precious objects, etc.
- TMS' content is in English only
    - Except for labels: they include both the French and English labels in TMS
- Generally happy with TMS
    - Some bugs here and there, but fixable with service packs/patches
- On the TMS exhibition module:
    - Have a full record of the exhibit afterwards
    - Also shows where in the exhibit space the object is
        - Zone, subzone, and even display case
    - Even tells about reproduced images in the exhibition

- Anne Mackay: chief conservator
- Manages anything relating to the physical condition of objects in the museum
- Delivers conservation files
    - Reports on the condition and conservation of artifacts
    - Currently written by hand
    - Will eventually be part of the TMS
- Preventative conservation
    - Loans, packing
    - Conditions and storage in collections management: temperature, humidity, etc.
    - Making sure objects to-be-accessioned aren't infested (puts them in freezer to kill potential infestations)
    - Supports for objects (in exhibition and storage)
    - Monitoring the conditions in the exhibition
        - Physical condition of the environment
        - Lighting conditions, etc.
        - Activity of objects (how often they're on exhibition, etc.)
- Remedial conservation
    - Fixing degrading objects
    - 95% of treatments done in house
    - Contracts out to private conservators for more complicated problems

- Research on the collection
    - Material culture
        - Looking at cultures, peoples, etc. through the objects they create
        - Looking at the objects in the collection, understanding their history and meaning
        - Looking at the objects itself: their design, material, etc.
- Heart of what the museum is about: taking care of and preserving artifacts

May 21, 2009, 3-5 PM: Information coordinator & 'web everything' (w/ Stephanie, Hugues, Nicole)

- Stéphanie Poisson: information coordinator
- Acts as the human link between TMS and web content
- Selects images and puts them up on Flickr
- Responsible for the images on CDs and DVDs (as well as the conservation - reburning after 5 years of all those data)
- Handles orders for photos (that needs new shots)
    - E.g., if an order for an unphotographed object comes in, request the photograph, make sure it goes into TMS, and sells it
- Communicates with Genevieve for labels, etc. for web content
- Content on the web passes through her first
- Ensures materials/photos isn't copyrighted
- Online exhibitions
    - Text that's in the exhibition goes online
    - It's not recreated; just repackaged
    - Exhibition content online serves more as a memory of the exhibition, and not as a virtual exhibition (i.e. if we compare with the virtual exhibit the McCord has on line, under "online" Keys to History)
    - Loaned objects are not online
- TMS uses section tags to mark where the objects are in the physical space
- Translation considerations
    - Everything with text needs to be translated
    - Lots of nuance in the language to consider when translating
        - E.g., time period of the language, words vs. concept, context, etc.
        - Sometimes two things in French translates into one thing in English (lack of one-to-one mapping of words/meaning)
    - They hire translators to do bulk of the work
    - Created tools for them to translate directly on the web, and enter it directly into the database

- Hugues Boily: 'web everything'
- Website database in MySQL
- Pages generated using a LAMP stack

- To put stuff online: ODBC -> MySQL -> forms and from Access (Access used as a frontend to the data)

- On the web database, the objects are sometimes described more simply than on the internal TMS database
    - More digestible for some types of information for web (e.g., category label, etc.)
    - Some words are translated into layman's terms; e.g. tool for food processing -> fork

May 22, 2009, 9-10 AM: Morning chat about FE + McCord direction (w/ Nicole)

- On the subject of maps…
    - Maps are liable to change (artifacts, content, layout, etc.)
    - Cost of propagating the change if we need a live, online version is undesirable
- "Web tours" are essentially a collection of artifacts
- "Simply Montreal" exhibition
    - Would like an integrated kiosk
    - Eventually putting the 3D touchless screen in the space to view different artifacts in 3D
    - Kiosk with touch screen interface to see more content and information, and link to other artifacts
    - Use CoolIris to provide more information on the artifacts
    - Longer video clips (2.5-4 minutes) to watch in the exhibition space
        - These are the type of video that the visitor needs to stop and deliberately decide to watch
        - This is different from really short video clips (~30 seconds) that visitors pass by and watch
        - Visitor should have a choice of video clips
        - Maybe this could be part of the mobile device experience: watching on the spot
    - Integrate touch screen games from the web into the physical space
        - Essentially repackaging what they already have on the web, and putting it in the physical space
        - E.g., "the mix and matching of costumes until you get it right" game
            - Interestingly, some players intentionally match incorrect costumes to get the various "bad ending" animations
- Never had audio guide tours, mobile device technologies at the McCord
- The touch screens at the McCord are all relatively newish (3D touchless screen, touch screen kiosks in "Simply Montreal")
- Visitor response to the 3D touchless screen has been good
    - Placement carries great importance
    - Initially placed in the front lobby. Since it was the area in which you pass to go to the café or museum, they thought it'd be a good public area for the screen.
    - But it didn't have much activity

    - They placed it right past the visitor ticket area, and got much higher traffic, and they're expecting even more when it's in the exhibition area
- Montreal Science Centre has some neat stuff going on
    - "Imagine" and "Aqua" exhibit
    - Lots of high tech, interesting, interactive, dynamic stuff in the physical space
- On conceptual mapping…
    - Need lots of data to do this meaningfully
    - Meaningful links have semantic qualifiers
        - E.g., "Dress" used as "Evening dress" used at "Gala", etc.
    - Need richness, volume of data for it to be meaningful
    - "Coolness" is one thing, but there needs to be real plus value too
- On bookmarking…
    - Gives a souvenir of the visit
    - Could we possibly tag in conjunction with bookmarking, right on the spot?
        - E.g., Right after identifying an object you like, or after you decide to keep it
    - Select objects, and in the end, send them an email
    - Collecting objects, displaying tags, sharing them
    - Interested in delivering the content as well as collecting it

May 22, 2009, 10-11 AM: More on exhibitions design (w/ Genevieve, intern)

- Exhibition designer takes all the documents—scenario, object list bible, etc.—and puts together drawings of what the exhibition space would look like
- "The bible"
    - A very long document listing all objects that are part of the exhibition, whether it's a loan or from the museum's own collection
    - Consists of object name, accession number, zone, photograph of the object, and
    - Dimensions (for the designer),
- To design an exhibition, there are lots of meetings, lots of daydreaming to come up with what they want the exhibition to be like
    - Ideas, what it should look like, etc.
- On look and feel for the exhibition…
    - Branding is apart of the design process
    - Branding is used for various things: exhibition entrance, invitation cards (for opening night), banners outside the building, publicity in metro stations (billboards, etc.), etc.
    - Communications department works with designers for the billboards, etc.
    - They've produced booklets and catalogues in the past, but not in recent years
        - E.g., "The Scots" exhibition
            - Gave publisher the exhibition text and photos
            - Publisher created picture book out of it
            - Restructured text to be read more like a book, in collaboration with the museum
            - Sold at the museum gift shop

        - Expensive to create these booklets
        - But adds value; online information doesn't really replace publication
- Exhibition department is responsible for the physical space, and has no real say on what goes on in the online space (although the text developed is replicated on the online site)
- Collaboration with other departments:
    - Curators
        - Comes up with idea
        - Chooses the objects and images
        - Produces the scenario that describes what the museum wants to say, and how to say it
        - Works closely with others to do this
    - Collections management
        - Oversees the movement of objects
    - Conservation
        - Ensures that objects can be exhibited
        - Cleans objects prior to exhibition if necessary, prepares for presentation
    - Education
        - Follows process of development of exhibition so that they can create educational products
        - Fed information by exhibition designers, but also meets with the curators
    - Communications (fulfills some marketing-related activities)
        - Creates documents for promotion
        - Getting the word out, etc.
    - Online/web
        - Gives the text and images from the exhibition to information coordinator (Stephanie)
        - Not much influence otherwise
        - A bit unfortunate as more should be carried through, as they do with banners and other extraneous materials
    - Scientists, experts (outside the museum)
        - Reviews content for correctness and looks for gaps (e.g., a particular event of impact that was overlooked, etc.)
        - Provides various sorts of feedback
- Placement of objects:
    - Exploration path is not forced
    - When getting to a particular zone in the physical space,
        - Some people might read one subzone/object before another
        - Need to take that into consideration when writing text; that is, text cannot depend on another subzone's/object's text
        - In subzones, objects relate to what's being said in the larger block of text within the subzone
    - Main text for entire zone ("zone text")
        - Biggest, most obvious

        - If you're coming to a zone, and not reading anything in it, they'd want you to read the zone text
    - Text for the subzone is more for a single theme, a single aspect of the story
    - Label text
        - Specifically about the object itself (identity, date, and medium)
        - E.g., Book published in 1858, made out of paper, belongs to McCord museum, acquisition number *x*, technical data, medium
        - For every object
    - "Long label" text
        - Tells a specific story about one particular object
        - A short text about a particular object; accompanies the label text
        - This is only for some objects, not all
        - Curator decides that a particular object's story is important and needs to be told within the context of the exhibition
        - i.e., objects with a long label have a story too important not to mention
        - Object itself could be visually insignificant, but of tremendous semantic importance
- Zones are named by subject, but subzones aren't always named
    - In the database, zones are just numbered (not named)
    - Names only exist in the documents
- In "Simply Montreal", and other long-term exhibitions,
    - Items are rotated only out of conservation requirements
    - Stone, glass, ceramics don't need to be rotated (wood sometimes needs to be rotated, depends largely on pigment)

May 22, 2009, PM: Head of multimedia + education programmes (w/ Marie-Claude, Stephanie, Nicole)

- Head of multimedia programmes & education
    - Marie-Claude Larouche
- Primary role is to strengthen the link that the institution has with the public
- Does outreach ("mediation")
    - E.g., visiting sick people, persons with disabilities, hospitals, etc.
    - Helping people reflect about their past
- Some of the McCord's activities are on a free basis
- Inspiration for activity ideas comes from:
    - The object, looking at it in different ways (one can explore a whole range of themes with objects)
    - The exhibition: creating programming to specifically match an exhibition
- Educational offerings on the web:
    - Proposing lesson plans for teachers, using museum resources
    - Engaging students in doing history, encouraging them to do their own research, letting them play the role of a historian

    - Publishing the works of secondary students online, on their website
        - Especially French, English, aboriginal students
    - For teachers far from Montreal, the web gives them access to museum content and material
    - Teachers coming to the museum may or may not be aware of what's on the their website
    - Web resources provide activities for before, during, and after the museum visit
    - Web resources:
        - Includes lesson plans
        - Connects to what's available on the rest of the website
        - Organized by theme (e.g., the confederation)
        - Teachers tend to ask the museum things like, "What can you tell me about the confederation?"
            - Museum web resources can show images and artifacts linked to confederation
            - Provides videos, games, education activities, web tours
    - In the future, it would be great if every teacher would be aware of the resources in preparation of the museum visit
    - There are 40-some lesson plans
        - Teacher's guide, student handout, etc.
    - Written resources
    - Links to external websites on related themes
    - Examples student work
        - From product of McCord's educational programming
- Motto: "answering the Monday morning needs of the teacher"
- Educational resources created in conjunction and in consultation with academic researchers
- Tools developed by teachers using McCord resources are also featured on the website
- Publishing of student and teacher-authored resources, etc. is done informally by contact
- Virtual exhibitions require help from curators
- Delivery of content is different in-house than it is online
    - Different set of considerations and expertise
    - Content level is similar
- Nicole manages both online and physical exhibitions, so more communication than before
- Most of their major clientele are 8-9 year olds (grades 4-5)
- Technological considerations
    - School and teachers have to allow the use of technologies (e.g., cell phones), particularly whether they can use devices during classroom activities
    - Possibilities with tagging (e.g., via RFID): bringing objects back into the classroom, pairing images up, etc.
- Marie-Claude would be interested in piloting the use of mobile devices in the physical space with a class; would be interested to work with a group of teachers so they could react to the prototype and plan pedagogical use of it.
- Recommendations of what to look into:

    - Tate's blog on the use of IT on the exhibition floor
    - VSA: Visitor Studies Association

May 22, 1-3 PM: Next steps on mobile, mapping, tagging, technologies, etc. (w/ Hugues, Stephanie, Nicole)

- On mobile applications design
    - Not all mobile devices afford the same interaction possibilities (e.g., multitouch on iPhone not available on all devices)
    - Should compensate by this by allowing for interaction redundancies (e.g., for zooming, should allow both the iPhone's multitouch zooming and a traditional interaction to zooming)
- Artifact display
    - Transferring the artifact sheet on the web onto the phone display
    - Equivalent of what's on the website onto the phone (repackaging existing content)
    - Ideally, query the system live (i.e., not some local cache or separate database)
    - But want to add something extra to the experience, more value somehow
        - Adding video (e.g., the 3-minute clips)
        - Assistive technologies? Enlarging the label/zone/subzone text
    - Objects represented by images
        - Images on McCord's website are 760x760
        - Image zoomifier used out of convenience (instead of giving access to a very large file), not out of copyright issues; seems to be alright to give access to originals
        - Charge for commercial applications, but not non-commercial
        - Don't want to make money over people, but don't want people to make money over use
        - After all, the objects were donated by the public in the first place
        - Want to provide access to objects to the community
        - Getty Museum has free offerings of images (high resolution too?)
    - Need to be sensitive and respectful of any images of First Nations artifacts used in the project
    - Maintain or change the UI template of the current artifact's page?
    - Maintain bilinguality
- Mapping
    - Physical maps with clickable zones, brings up a list of objects in that zone
- Tagging
    - If users are tagging the images, they should be given a sense of gratification, some acknowledgement of contribution
- 2D barcodes
    - QR codes are used at the Sydney Powerhouse Museum

    - Look into their “Fresh and Newer” blog, especially their March 5, 2009 article, “Problems and Opportunities”
    - QR codes also used by a zoo in New Zealand for 3D advertising
    - US Air Force exhibition using QR codes to extend content already in the physical space
- Bookmarking
    - Visitor being able to select and collect objects as he/she walks through the space
    - Via RFID, or possibly through the mobile device (just selecting on the screen; via the maps and/or artifacts list)
    - Eventually to create personalized tours
- Website implementation
    - Site uses PHP script to query database, outputs the artifact in XML
    - In-house XML schema
    - Website UI was implemented by contractors, but designed collaboratively
- Eventually, may draft up an API to access content at the museum