



North East Museums

Exhibitions by North East Museums Exhibition Policy and Procedure

Name of governing body: North East Museums Strategic Board

Date for review: March 2027

What is an exhibition?

For the purpose of this document, the definition of an exhibition will define whether or not it will be managed through Exhibitions by TWAM Ltd. If it is not to be managed through Exhibitions by North East Museums, it does not need to follow the below process. However, in these cases, they may be referred to as exhibitions to the general public, for example, on North East Museums' websites and social media.

In its simplest form, an exhibition is a curated display of objects of interest for public consumption. For the purpose of this document, exhibitions will be assumed to be physical, based on the requirements of the Museums and Galleries exhibitions tax relief. However, should digital exhibitions become eligible for the tax relief, and/or if Exhibitions by North East Museums choose to produce digital exhibitions, an amendment to this policy and procedure to incorporate them will be drafted.

An exhibition qualifies for Museums & Galleries Exhibition Tax Relief if it is one which is a curated public display of an organised collection of objects or works considered to be of scientific, historic, artistic or cultural interest. It can consist of a single work or object. It should be open to the public for a defined period of time, i.e., not classed as a long-term or permanent display.

Exclusions to whether it would be determined as an exhibition include if:

- it will be on display for over five years, in which case it would be considered a permanent display
- its main purpose, or one of its main purposes, is to sell anything displayed or to advertise or promote goods or services
- it is organised in connection with a competition of any kind
- it includes a live performance by any person (except where that performance is merely incidental to or forms a merely incidental part of the exhibition)
- anything displayed is for sale
- anything displayed is alive
- the programming, curation and display of the exhibition has been carried out by another organisation, e.g. Newcastle University. However, this should still be raised to the Project Manager for consideration of impact on staff time.
- it is an intervention within an existing permanent display that does not include the addition of any objects (e.g. the reinterpretation of displayed objects within a themed trail).

What is the purpose of an exhibition?

This policy links directly to the [Programming Strategy](#) which states that we programme exhibitions (and events) to:

- Engage people
- Support places and raise North East Museums' profile
- Raise awareness and encourage action about local and global issues
- Share a diversity of stories connected to our collection
- Provide learning opportunities and stimulating experiences
- Generate income (where relevant)

Our programming principles are:

- Audience focused
- Authentic
- Inclusive
- Quality
- Sustainable

For more information, see the Programming Strategy (link above).

Roles and Responsibilities

Exhibitions by North East Museums: Project Manager	Overall strategic management of Exhibitions by North East Museums and management and co-ordination of North East Museums' exhibition programme within agreed timescales and budget provision. Establishes matrix exhibition project teams and leads exhibition planning and review meetings.
Venue Manager	Project Executive. Final approval of exhibition, budget, object list and interpretation relating to the exhibition. Approval of expenditure through financial procedures. Wider programme considerations including learning and events.
Project Manager (This may be a Keeper/Assistant Keeper but could also be another member of staff)	Co-ordinates the exhibition planning and production liaising with internal and external teams. Provision of Object Lists and other required information as per agreed deadlines.
Venue team including Keepers	Object lists, packing, transport, liaising with conservation and documentation, update EMU records, installation, case layouts, etc. Management of external design team if appropriate.
Design Team	If internally designed, design of 2D and 3D elements of exhibition, including plinths, walls, structures, labels, and panels.

Conservation Team	Providing expertise on suitability of objects for display in suggested locations. Carrying out conservation work on collection items for display in exhibition. Condition checking loans in where relevant and appropriate.
Technician Team	Construction of exhibition structures as per designs, providing advice on build.
Documentation Team	Support through processing and documentation of loans in, movement of objects around North East Museums, etc. Advice on insurance and facilities/security reports.
Communications Officer	Formulate communications strategy for exhibition, including stakeholder events, PR and all promotional materials and activity.
Finance Team	Timely payment of invoices following correct raising of requisitions by relevant officer(s) including necessary quotation summary, freelance, and goods receipting documents. Provision of budget monitoring. Procurement guidance.
Front of House Team including Facilities Assistants	Ensuring exhibition space is adequately prepared for installation, including decoration of walls, build, etc., as required. Installation of exhibition. During run of exhibition, provide welcome, information and briefings.
Programming/ Learning / Communities	Learning Officer, Events Coordinator, Communities Team to plan and facilitate wider engagement including learning and events.
North East Museums Enterprises	Explore and exploit potential commercial opportunities including linked retail and cafe offers.
Development Team	Explore and exploit potential fundraising and sponsorship opportunities.

Exhibition project management process

The below procedure must be followed for all exhibitions, as defined above.

1. Initiation – Exhibition Proposal form

The completion of the [Exhibition Proposal form](#) should be as soon as possible in the planning process of the exhibition. Once the form has been submitted, the Exhibitions by North East Museums Project Manager will schedule for it to be brought to the next available Leadership meeting for sign off and provide an accompanying written report including how it will fit in the overall schedule. The relevant Venue Manager should be in attendance to provide any additional information or clarification. Once confirmed as approved, any eligible staff time or expenditure can be recorded for Museums and Galleries Exhibitions Tax Relief. It is understood that the exhibition title, dates, etc. may change, however the sooner the

exhibition can enter into the Planning Phase, the more beneficial this is for North East Museums.

The Exhibition Proposal form includes key information, including but not limited to:

- Project Manager and main contact for the exhibition
- Proposed opening and closing dates
- Location (venue and exhibition space)
- Brief description
- Objectives of the exhibition
- Impact and Insight dimensions
- Footfall target & target audience
- Budget and funding sources, including potential for fundraising
- How the exhibition addresses North East Museums' environmental responsibility and commitment to sustainability
- How the exhibition helps North East Museums to meet its commitment to engaging audiences
- Anticipated requirements from Central Services:
 - o Conservation (e.g. types of objects to be displayed, conservation/preparation work required, condition checking, installation and deinstallation of items)
 - o Documentation (e.g. external loans or from North East Museums' collection, number of items)
 - o Design
 - o Technicians

2. Add exhibition to systems

Once submitted, the Project Manager will confirm approval by Venue Manager and save the Exhibition Proposal form in the [Exhibition Proposals](#) folder, and set up a shared folder for project documents to be stored in. Where the exhibition is particularly complex, it may be determined that a separate Team or channel may be appropriate. Relevant information will be added to the [Exhibitions by North East Museums Master Spreadsheet & Calendar.xlsx](#) and the exhibition will be set up as a new tracking category in XERO to enable expenditure reporting.

As soon as possible, but ideally no later than 4 weeks after the submission of the Exhibition Proposal, the Project Manager should complete and submit a [budget breakdown](#) for the exhibition to the Exhibitions by North East Museums Project Manager. This information will be inputted into XERO and enable the Venue Managers to view expenditure against budget for each exhibition for which they are responsible. Changes can be made to exhibition budgets after this submission with agreement from the Venue Manager.

3. Project meetings

The Exhibitions by North East Museums Project Manager will schedule an initial Exhibition Project Meeting, to include representatives from Communications, Conservation, Design, Documentation, as well as the lead curator and venue manager. Other relevant members of staff may also be included.

A standard agenda will be followed, chaired by the Exhibitions by North East Museums Project Manager.

Initial Exhibition Project Meeting Agenda:

		Lead	Accompanying Documents
1.	Synopsis / brief overview of exhibition <ul style="list-style-type: none"> - Dates - Location - Objectives - Budget 	Lead Curator	Link to Exhibition Proposal
2.	Audience / Communications <ul style="list-style-type: none"> - Segments - Visitor target 	Communications representative	
3.	Exhibition objects <ul style="list-style-type: none"> - Loans in - North East Museums Collection - Conservation requirements - Case bookings and case condition checking 	Lead Curator	
4.	Design <ul style="list-style-type: none"> - Opportunities for recycling build material, exhibition assets. - Accessibility requirements 	Design representative	
5.	Risk Review <ul style="list-style-type: none"> - Health & Safety (hazardous objects) 	Lead Curator	Risk Register
6.	Representation of diverse voices	Lead Curator	
7.	Environmental Responsibility	Lead Curator / Design representative	

8.	Learning and Engagement Programme	Learning / Communities Lead	
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During the initial meeting, the frequency of future meetings will be agreed by the group, in consideration of the size, complexity and timescales of the exhibition.

Future meetings will also follow a standard agenda.

Exhibition Project Meeting Agenda:

		Lead	Accompanying Documents
1.	Actions from last meeting	Project Manager	Action Log
2.	Budget review	Lead Curator	Budget
3.	Audience / Communications	Communications representative	
4.	Exhibition objects <ul style="list-style-type: none"> - Loans in - North East Museums Collection - Conservation requirements 	Lead Curator	Exhibition Object List
5.	Design	Design representative	Designs to be shared as applicable
6.	Risk Review <ul style="list-style-type: none"> - Health & Safety (hazardous objects) 	Lead Curator	Risk Register
7.	Representation of diverse voices	Lead Curator	
8.	Environmental Responsibility	Lead Curator / Design representative	
9.	Learning and Engagement Programme	Learning / Communities Lead	

It should be noted that additional, separate meetings may take place, organised by the Lead Curator, to discuss other elements of the exhibition such as interpretation and exhibition text, narrative, learning, programme planning, wayfinding, events, volunteers, etc.

4. Project documentation

All documentation relating to the exhibition should be saved in a shared folder (see above section 2), to ensure it is accessible to all members of the project team and can be easily referred to during or separate to project meetings.

This should include:

- A copy of the approved exhibition proposal form
- Notes from project meetings
- Action log (template here: [add in link](#)). Along with actions from each project meeting, this will also include key deadlines including final object list, text copy, design brief, 2D and 3D design work, completion of build, etc.
- Budget (template here: [Exhibition Budget Template](#))
- Object list (collection and loans in) – this will be considered draft until a final object list agreed. The final object list should be agreed no later than 6 weeks before the opening date of the exhibition. This should also be reflected in the Event module in KE EMu. Anything not on the final object list by the agreed date must not be included in the exhibition without exceptional approval from the Project Executive/Venue Manager following consultation with relevant teams.
- Risk Register (template here: [Standard Project Risk Register Template May 2023 \(1\).docx](#))

5. Installation plan to be arranged and agreed.

As early as possible, but no later than one month prior to the installation of the exhibition, the Exhibitions by North East Museums Project Manager will arrange a meeting with the project team and relevant members of the FOH venue teams to discuss and agree the installation plan. This will include:

- A day-by-day breakdown of the installation period including painting, build elements, conservation checking and installation of items
- Confirmation of how items will be displayed

6. Installation of exhibition

The installation will take place according to the agreed installation plan and in line with the proposed exhibitions Health and Safety procedure. A lead contact will be nominated (e.g. the lead curator) to deal with any queries, with a named deputy in case of unexpected emergencies.

7. Initial lessons learnt survey/session

Following the opening of the exhibition to the public, the Exhibitions by North East Museums Project Manager will circulate a survey to the exhibition project team, gathering thoughts on what went well or not during the project to date. A session (or multiple sessions) will be held to discuss the findings and determine what improvements can be made for future exhibition projects. It will also include reviews of audience feedback presented by the relevant Comms officer. This will be added to

a central lessons learnt resource (add link), which all staff will be able to access and utilise, promoting shared knowledge and best practice across the organisation.

This will be broken down by exhibition and area/department, enabling colleagues to easily find relevant lessons and best practice.

8. Deinstallation plan to be arranged and agreed

As early as possible but no later than one month prior to the deinstallation of the exhibition, a meeting should be arranged with the project team and relevant members of the FOH venue teams to discuss and agree the deinstallation plan. This will include:

- A day-by-day breakdown of the installation period including conservation checking and deinstallation of items, removal of build elements, painting
- Confirmation of transport booked for objects and cases (where applicable) and movement of collection objects into stores.

9. Deinstallation of exhibition

The deinstallation will take place according to the agreed deinstallation plan and in line with the proposed exhibition H&S procedure. A lead contact will be nominated (e.g. the lead curator) to deal with any queries, with a named deputy in case of unexpected emergencies.

10. Lessons Learnt

The Project Manager will arrange a lessons learnt survey and discussion session(s) to collate what went well, what didn't go well, and improvements or learnings for future exhibitions. Audience feedback, marketing insight, and relevant commercial income will also be shared and discussed, with the results will shared centrally (add in link).