

# NORTHEAST MUSEUMS

Exhibition (Project)  
Policy and Process

Name of Governing Body: NEM Strategic Board  
Date of Last Review: 25.03.2026  
Date for review: March 2029

# Exhibition Policy

## Background

North East Museums (NEM) is a regional museum, art gallery and archive service managing twelve museums and galleries across Northumberland, Tyneside and the Archive Service for Tyne and Wear and is a joint service of five local authorities, Newcastle City Council (NCC) acts as lead authority and legal body.

The 12 venues: -

- Arbeia South Shields Roman Fort
- Discovery Museum
- Great North Museum: Hancock
- Hatton Gallery
- Hexham Old Gaol
- Laing Art Gallery
- Morpeth Chantry Bagpipe Museum
- Segedunum Roman Fort
- South Shields Museum & Art Gallery
- Stephenson Steam Railway
- The Shipley Art Gallery
- Tyne & Wear Archives (based at Discovery Museum)
- Woodhorn Museum

Exhibitions are free at eight venues. At Hexham Old Gaol, Segedunum and Woodhorn Museum all exhibitions take place within the sites' paywall and at the Laing Art Gallery a charge is made for the main temporary exhibition programme. See our [Programming Strategy](#) for more information about how NEM programmes exhibitions.

Each venue is responsible for

- delivering a programme of temporary exhibitions
- caring for collections and permanent gallery and exhibition spaces
- maintaining a high standard of visitor experience

This work is supported by NEM's inhouse Collections, Documentation, Design, Technical, Communications and Development teams.

NEM contracts out exhibition management production activities to Exhibitions by NEM to utilise the Museums & Galleries Exhibition Tax Relief (MGETR) scheme.

Following this procedure enables NEM to:

- Allocate and prioritise organisational resources effectively
- Maximise Museums & Galleries Exhibition Tax Relief claim income
- Effectively plan and deliver exhibitions alongside other organisation priorities
- Allow for accurate budget forecasting

## **Scope**

This policy defines the process to follow by North East Museums staff when planning and delivering:

- temporary exhibitions
- maintaining & commissioning refurbishment of permanent gallery and exhibition spaces
- maintaining and caring for collections
- commissioning non exhibition related work from the Collections, Design or Technical inhouse teams

## **Exhibition Criteria**

An exhibition is a curated, physical display of objects or works of interest for public consumption and can be:

- permanent or temporary
- of any size scale
- initiated and generated by NEM staff
- hired or on tour from other providers
- generated in partnership with other cultural partners (for example as part of a grant funded programme)
- generated in partnership with other non-cultural partners (for example a collaboration with a community group)
- hosted on behalf of other providers
- hosted on behalf of community groups

## **When does an exhibition qualify for MGETR?**

### **A qualifying exhibition**

- is a curated public display of an organised collection of objects or works considered to be of interest in one of the following ways:
  - scientifically
  - historically
  - artistically
  - culturally
- can be a single object
- has at least 25% of core costs spent on goods or services that are provided from within the UK or the EU, Norway, Iceland and Liechtenstein known as the European Economic Area (EEA) — from 1 April 2024, at least 10% of the 'core costs' must relate to activities in the UK
- the public do not have to be charged for admission to an exhibition; however, they must be admitted in person

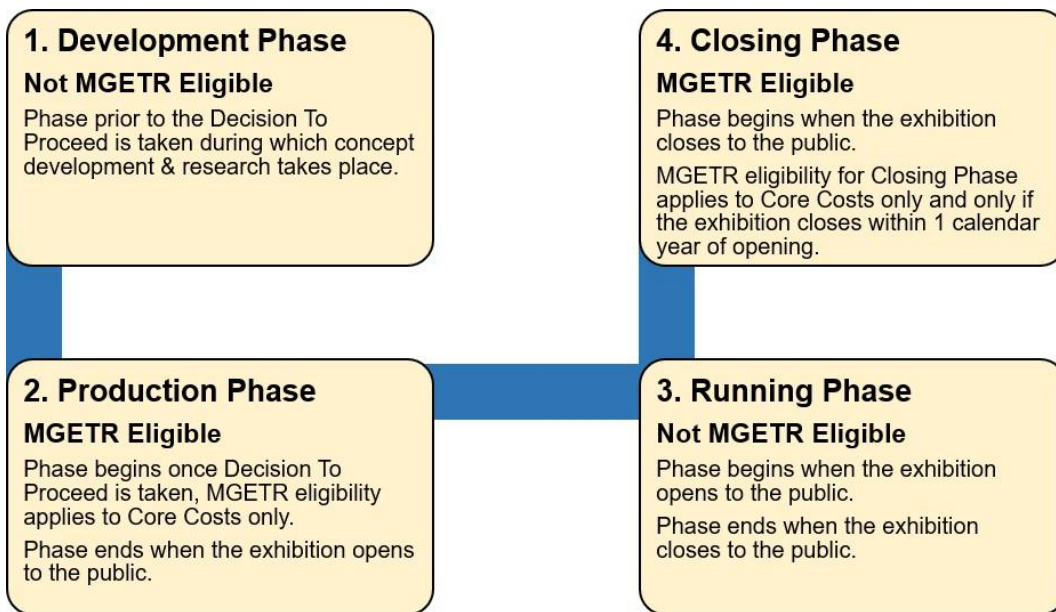
### **Core costs**

- producing the exhibition (including principal photography)
- uninstalling and closing the exhibition if it's open for one year or less

### Non-core costs

- speculative development on initial concepts and feasibility
- non-producing activities
- the cost of running the exhibition during the period which it is open to the public
- expenditure on purchasing exhibits
- expenditure on infrastructure, unless incurred solely for the purposes of the exhibition

### Production phases & MGETR eligibility



### Non qualifying exhibitions

- which are organised in connection with a competition
- which are not held in person, for example, online exhibitions
- which include a live performance by any person, except where this is incidental
- where anything displayed is:
  - for sale
  - alive

Further eligibility guidance is available here

[Claiming Museums and Galleries Exhibition Tax Relief for Corporation Tax - GOV.UK](#)

[Museums and Galleries Exhibition Tax Relief - HMRC internal manual - GOV.UK](#)

## Key Definitions

<b>Exhibition</b>	<ul style="list-style-type: none"> <li>• Meets one of the exhibition criteria listed above.</li> <li>• Open to the public for a defined period that is less than 1 year from point of opening.</li> <li>• Open to the public for a defined period that is longer than 1 year from point of opening.</li> </ul>
<b>Touring Exhibition</b>	<ul style="list-style-type: none"> <li>• Held at more than one venue</li> <li>• At least 25% of the displayed at the first venue, displayed at every subsequent venue.</li> <li>• No more than 6 months between deinstallation at one venue and installation at the next venue.</li> </ul>
<b>Non-Exhibition</b>	<p>Work requests made to the Collections, Design or Technical inhouse teams not relating to Exhibitions.</p> <ul style="list-style-type: none"> <li>• Caring for collections and permanent gallery and exhibition spaces.</li> <li>• Maintaining a high standard of visitor experience.</li> </ul>
<b>Project</b>	<ul style="list-style-type: none"> <li>• The collective term for the terms listed above.</li> <li>• Refers to the period from initial concept to final evaluation.</li> </ul>

## Roles and Responsibilities

NEM SLT Team	Overall strategic management of NEM exhibitions and day to day operations.
<b>The Scheduling Team</b> Communication & Development Manager Collections Manager Corporate Governance	<p>Manage and co-ordinate design and technical requests into a schedule, identify potential clashes and allocate design / technical resources.</p> <p>Manage and co-ordinate conservation and documentation requests into a schedule, identify potential clashes and allocate resources.</p> <p>Co-ordinate temporary exhibition and major gallery/exhibition refurbishment requests into a schedule.</p> <p>Assesses project for MGETR eligibility.</p>
Venue Manager	<p>Final approval of the project including budget, object list and interpretation relating to the exhibition or ad hoc work.</p> <p>Approval of expenditure through financial procedures.</p> <p>Wider programme considerations including learning and events.</p>
Project Lead (The person leading the exhibition or ad hoc work)	<p>Responsible for ensuring the relevant form is submitted for review by the Scheduling Team.</p> <p>Budget monitoring. Co-ordinates the project planning and production liaising with internal and external teams.</p>

	<p>Provision of object lists and other required information as per agreed deadlines.</p> <p>Object lists, packing, transport, liaising with conservation and documentation, update EMU records, installation, case layouts, etc. Management of external design team if appropriate.</p>
Design and Technical Team	<p>Design of 2D and 3D elements of the project; including plinths, walls, structures, labels, and panels.</p> <p>Construction of exhibition structures as per designs, providing advice on build or liaising with external contractor re. build.</p>
Collections Team Assigned Conservator	<p>Collection and loaned object condition checking, conservation, preparation, install &amp; destall for display objects for a project.</p>
Documentation Team Assigned Documentation Contact	<p>Support through processing and documentation of loans in, movement of objects around NEM venues.</p> <p>Advice on insurance and facilities/security reports.</p>
Communications Team	<p>Formulate a communications strategy for the project, including stakeholder events, PR and all promotional materials and activity.</p> <p>Evaluation where applicable.</p>
Finance Team	<p>Timely payment of invoices following correct raising of requisitions by relevant officer(s) including necessary quotation summary, freelance, and goods receipting documents. Provision of accounting software reports.</p>
Front of House Team including Facilities Assistants	<p>Ensuring project space is adequately prepared for installation, i.e. decoration of walls, build, cleaning, as required.</p> <p>Provide support to the Installation and Deinstallation of an exhibition or other project related facilities work.</p> <p>During the run of an exhibition, provide welcome, information and briefings.</p>
Programming / Learning / Communities	<p>Learning Officer, Events Coordinator, Communities Team to plan and facilitate wider engagement including family learning, learning and events.</p>
Development Team	<p>Explore and deliver potential fundraising and sponsorship opportunities.</p>
Commercial (TWAMe)	<p>Explore and deliver potential commercial opportunities including linked retail and cafe offers.</p>

For further information about this policy please contact:

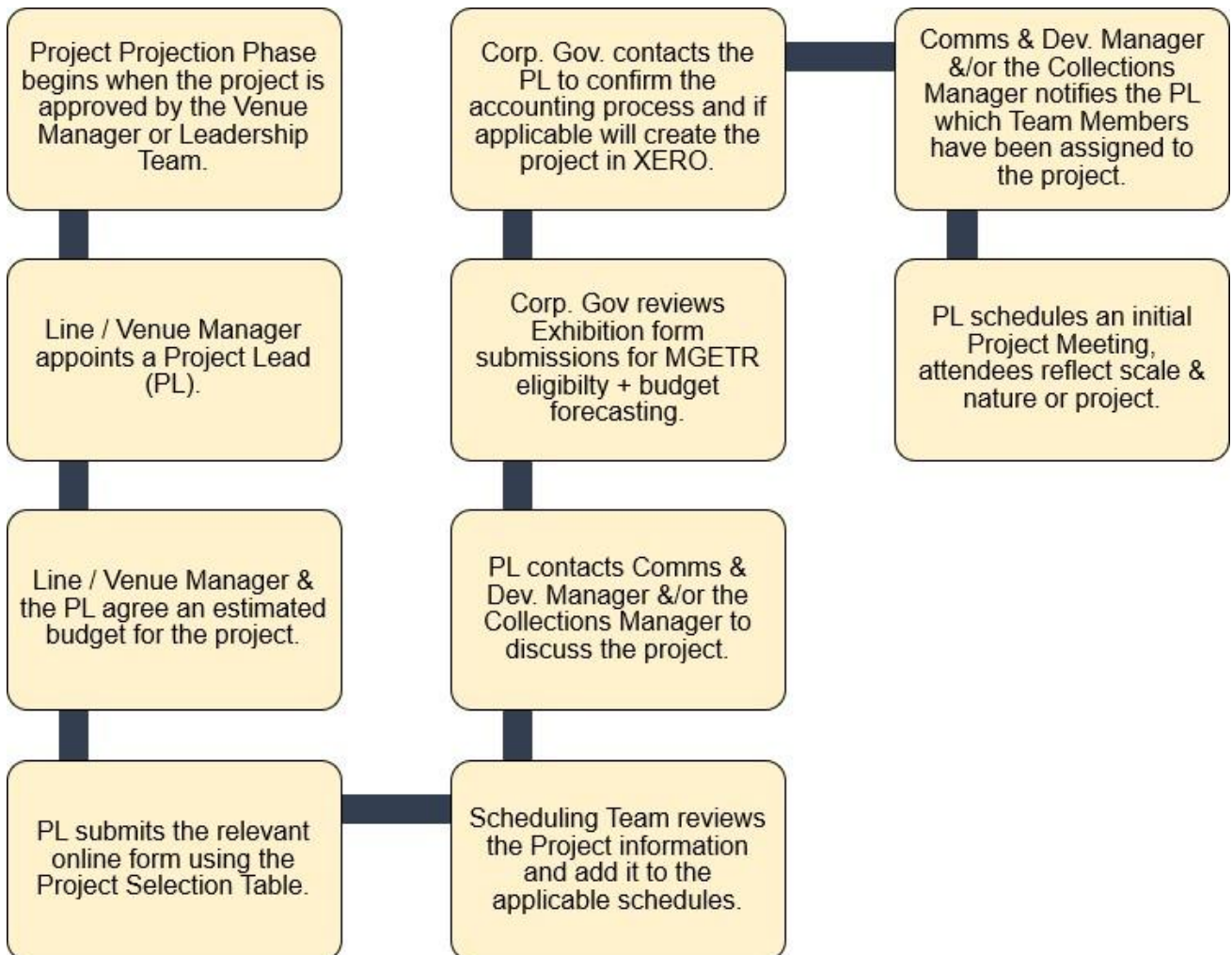
Communications & Development Manager

Collections Manager

Business Partner

## Exhibition (Project) Process

For the purposes of this document the term “Project” refers to the period from production phase to final evaluation for Temporary, Permanent, Touring and Non-Exhibition related work. This process aims to allow Project contributors to allocate and prioritise organisational resources effectively while delivering other organisation priorities.



Each Project request will vary in scale and nature, which in turn will determine the level of support required from the NEM inhouse central service teams. This particularly applies to the condition of Collections objects and/or works, which should be taken into consideration, when determining the Project Type.

If you have any queries about the process or wish to discuss a Project, please speak with the relevant person listed below.

- Communications & Development Manager
- Collections Manager
- Business Partner

## Project Selection Table

Please submit all proposals & estimated budget (where applicable), ideally, at least one year in advance of opening or required completion date.

Project Type	Scale	Project meetings initiated	Link to required form
<b>Exhibition - Large</b> <ul style="list-style-type: none"> <li>• Large gallery space/area</li> <li>• 10+ objects</li> <li>• Space redecoration i.e. full repaint and hang</li> <li>• Multiple temporary builds required</li> <li>• National loan/s</li> <li>• Multi-faceted requirements</li> <li>• £10k+ budget</li> </ul>	Large	18 months	<a href="#">Exhibition proposal</a>
<b>Exhibition - Medium</b> <ul style="list-style-type: none"> <li>• Smaller exhibit space</li> <li>• Under 10 objects</li> <li>• Minor space redecoration and hang</li> <li>• Simple temporary build, i.e. plinth</li> <li>• Internal loan/s</li> <li>• £2k to £10k budget</li> </ul>	Medium	12 months	<a href="#">Exhibition proposal</a>
<b>Exhibition - Small</b> <ul style="list-style-type: none"> <li>• Small exhibition space/area</li> <li>• Under 10 objects in good condition</li> <li>• No build required</li> <li>• No redecoration or hang</li> <li>• Internal loan/s</li> <li>• Under £2k budget</li> </ul>	Small	6 months	<a href="#">Exhibition proposal</a>
<b>Full refurbishment of permanent space</b> <ul style="list-style-type: none"> <li>• A permanent gallery or exhibition space will be fully redecorated and refurbished.</li> </ul>	Large	18 months	<a href="#">Major refurbishment – permanent gallery or exhibition space proposal</a>
<b>Non-Exhibition Project - Large</b> <ul style="list-style-type: none"> <li>• Significant changes to objects or artwork on display in a permanent exhibition space.</li> <li>• Large scale build, i.e. new walls.</li> <li>• Redesign of display.</li> <li>• Not a full refurbishment.</li> </ul>	Large	18 months	<a href="#">Collections only - work request</a>  <a href="#">Design &amp; Technical only work request</a>
<b>Non-Exhibition Project - Small</b> <ul style="list-style-type: none"> <li>• Label updates</li> <li>• Small build i.e. small plinth or frame</li> <li>• Minor changes to displayed objects</li> </ul>	Small	3 months	<a href="#">Collections only - work request</a>  <a href="#">Design &amp; Technical only work request</a>

## **Budget**

The Project Lead will be required to upload a completed [Exhibition Budget Template](#) when submitting the [Temporary Exhibition Form](#) and [Major Refurbishment of a Permanent Gallery or Exhibition Space Form](#).

The budget template lists the Xero codes available for use, do not use codes which are not listed, this is to support accurate financial forecasting and reporting.

As with other finance forms the sheet has been set to view only and will need to be saved to the relevant Project Folder before uploading.

## **Next Steps**

Once the relevant form has been submitted it will be reviewed by the Scheduling Team, comprising of all or one of the staff below, to check for clashes and added to the appropriate [Exhibition, Collections & Design Schedule](#)

- Communications & Development Manager – Sheryl McGregor  
**Design & Technical**
- Collections Manager – Ruth Slaney  
**Collections & Documentation**
- Corporate Governance – Gayle Matthews  
**Exhibition Budget / Xero / MGETR**

Once the form has been submitted, the Project Lead, can then contact the relevant member of the Scheduling Team to discuss Collections, Design and Technical requirements. A lead Collections and/or Design and Technical contact will then be assigned to the Project.

Corporate Governance will

- review Exhibitions related Project submissions for MGETR eligibility
- set up new tracking categories in Xero if required
- advise the Project Lead which accounting process to follow.
- save the Exhibition Proposal form in the [Exhibition Proposals](#) folder

The Project Lead is responsible for scheduling the first Project Meeting and inviting attendees from the Roles and Responsibilities list to reflect the Project scale and nature.

It is understood that various elements, including budget relating to the submitted proposals or work requests will change over the course of the project. This particularly applies to the condition of Collections objects and/or works required for the Project.

To amend or discuss any aspect of the project or submitted forms, contact the relevant member of the Scheduling Team.

## **Project meetings**

The Project Lead is responsible for scheduling the Project Meetings including inviting representatives from Communications, Conservation, Design, Documentation, Development (if fundraising is involved) as well as other relevant staff from their team, the wider organisation or external partners.

An example Project Initiation agenda can be found below:

<b>Agenda Item</b>	<b>Lead</b>	<b>Accompanying Documents</b>
Synopsis / brief overview of exhibition To agree: <ul style="list-style-type: none"> <li>- Dates</li> <li>- Location</li> <li>- Scale</li> <li>- Objectives</li> <li>- Budget</li> </ul>	Project Lead	Link to relevant form and budget
Audience / Communications / Reputational Risk To agree: <ul style="list-style-type: none"> <li>- Target audiences</li> <li>- Key messages</li> <li>- Footfall / Ticket sales target</li> </ul>	Communications representative	
Exhibition objects <ul style="list-style-type: none"> <li>- Loans in</li> <li>- NEM Collection</li> <li>- Conservation requirements</li> <li>- Case bookings and case condition checking</li> </ul>	Project Lead	
Design <ul style="list-style-type: none"> <li>- Opportunities for recycling build material, exhibition assets.</li> <li>- Accessibility requirements</li> <li>- Overall design requirements</li> </ul>	Design representative	
Risk Review <ul style="list-style-type: none"> <li>- Media and Social Media</li> <li>- Health &amp; Safety (hazardous objects)</li> <li>- Security</li> <li>- Potential impact on staff/ visitors due to content (trauma review)</li> </ul>	Project Lead	Risk Register
Representation of diverse voices	Project Lead	
Environmental Responsibility	Project Lead / Design representative	

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 Project.

Future meetings should also follow a standard agenda. As part of the NEM Supporting and developing our people framework guidance has been created about organising effective meetings. We would recommend these principles are followed in all project meetings.

Example Project Meeting Agenda:

<b>Agenda Item</b>	<b>Lead</b>	<b>Accompanying Documents</b>
Actions from last meeting	Project Lead	Action Log
Budget review	Project Lead	Budget
Audience / Communications / Reputational Risk	Communications representative	
Exhibition object list & Conservation	Project Lead	Exhibition Object List
Design	Design representative	Designs to be shared as applicable
Risk Review <ul style="list-style-type: none"> <li>- Media and Social Media</li> <li>- Health &amp; Safety (hazardous objects)</li> <li>- Security</li> <li>- Potential impact on staff/ visitors due to content (trauma review)</li> </ul>	Project Lead	Risk Register
Representation of diverse voices / Accessibility	Project Lead	Decolonisation report and recommendations Equalities policy
Environmental Responsibility	Project Lead / Design representative	Environmental Responsibility Strategy
Learning and Engagement Programme	Learning / Communities Lead	Learning and Engagement Strategy

### **Project documentation**

All documentation relating to the exhibition should be saved in a shared folder, 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 relevant Project form
- Notes from Project meetings
- Budget (template here: [Exhibition Budget Template](#))
- Object list (collection and loans in) – this will be considered draft until a final object list agreed.
- Risk Register (template here: [Standard Project Risk Register Template May 2023.docx](#))

### **Installation Plan**

To be arranged and agreed as early as possible, but no later than one month prior to the installation of the Project, a meeting should be arranged with the Project team and relevant members of the FOH venue teams to discuss and agree the installation plan. This should 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

The installation will take place according to the agreed installation plan and in line with the proposed exhibitions Health and Safety procedure. The Exhibition lead will deal with any queries, with a named deputy in case of unexpected emergencies.

### **Deinstallation plan**

To be arranged and agreed as early as possible but no later than one month prior to the deinstallation of the Project, 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.

The deinstallation will take place according to the agreed deinstallation plan and in line with the proposed exhibition H&S procedure. The Project Lead will deal with any queries, with a named deputy in case of unexpected emergencies.

### **Lessons learnt meeting (where applicable)**

Following the opening of the exhibition to the public, the Project Lead should organise a meeting to gather thoughts on what went well or not during the project and determine what improvements can be made for future projects.

This meeting should also include audience feedback presented by the relevant Communications Officer. The discussion should be recorded in a document that can be shared more widely or used to inform future Project planning. Use this [Reflecting & Learning Together](#) to review projects.