

# Toolkit

DEVELOPING AN ECONOMIC  
AND PRODUCTION STRATEGY  
FOR TOURING EXHIBITIONS



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## **DEVELOPING AN ECONOMIC AND PRODUCTION STRATEGY FOR TOURING EXHIBITIONS**

**Edited by:**

Charlotte Dew, Touring Exhibitions Group

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# INTRODUCTION

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## 1 INTRODUCTION

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# 1 INTRODUCTION

## Who is the toolkit for?

This toolkit - *Developing an Economic and Production Strategy for Touring Exhibitions* - is designed to assist organisations who:

are interested in starting to tour exhibitions  
or  
currently tour exhibitions and would like to review their approach.

The toolkit has been developed as part of the Touring Exhibitions Group's (TEG) Arts Council England (ACE) Resilience Fund programme *Economics of Touring Exhibitions: Models for Practice*. Users are also referred to the *Economics of Touring Exhibitions Survey Report: An Analysis of Touring Exhibitions Practice in the UK*, and advocacy document *Economics of Touring Exhibitions Recommendations for Practice* for further information to support consideration of an approach to touring exhibitions.

## What is the toolkit for?

The resource provides UK museums and galleries, of all types and scales, with a framework for analysis and strategic development, to support the selection of an appropriate economic and production model for touring, to suit the particular circumstances in which they are operating.

**The selection of an economic and production model underpins a strategic approach to touring exhibitions, without which it is more challenging to:**

- Project costs and potential income
- Identify the key performance indicators against which the programme can be measured
- Target an audience or audiences

- Adopt and maintain a position within the marketplace
- Apply for funding
- Integrate touring exhibitions into a core exhibitions programme
- Find and develop suitable partnerships
- Manage expectations

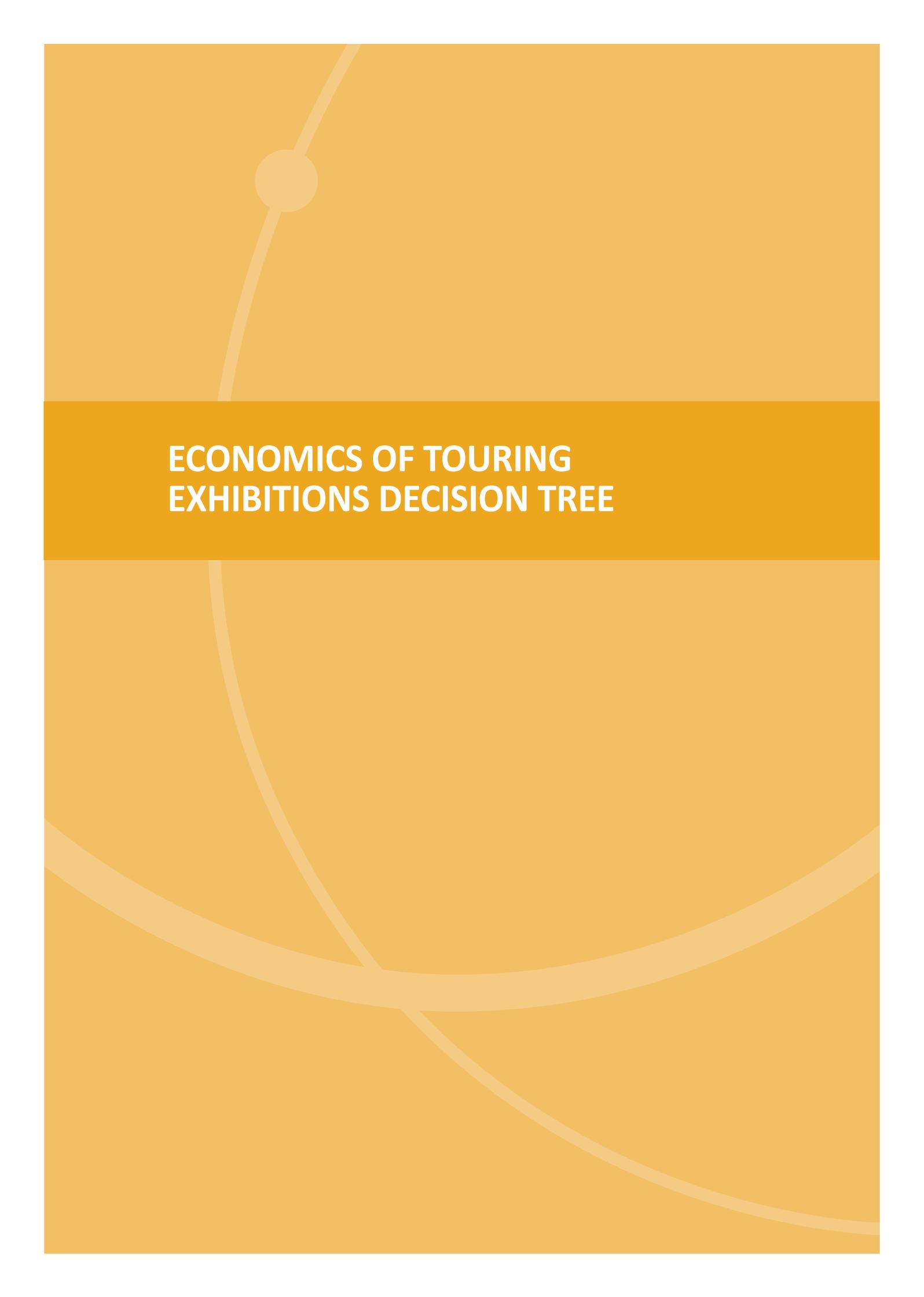
Touring exhibition programmes are most successful in organisations where they are an embedded activity, rather than being or perceived as being an add-on.

## What is in the toolkit?

**The toolkit can be used by individuals, a team or at organisational level to prompt discussion, planning and strategic development. It supports:**

- The identification of aims and objectives
- Assessment of organisational resources and capacity to support touring
- Assessment of the current external factors that may influence the development of a touring programme
- Identification of potential sources of funding
- Consideration of sustainable approaches to touring
- Consideration of touring in partnership

Section one of the toolkit presents a decision tree, to work through, to support discussion, analysis and decision making. The decision tree refers users to further thematic resources in the toolkit, at appropriate points in the decision making process, which provide context and information.



**ECONOMICS OF TOURING  
EXHIBITIONS DECISION TREE**

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# 1 INTRODUCTION

The economics of touring exhibitions decision tree encourages discussion and decision making. It refers to additional resources and information in the toolkit where relevant. Users are encouraged to work through it sequentially, and collate information at each stage, to help inform the selection of an economic and production model for touring exhibitions, appropriate to their circumstances.

## TEG defines an economic model for touring exhibitions as:

*'The way you manage all costs and income connected to your touring project'.*

i.e. the costs you allocate to the project and the sources of income you use to cover these costs.

The economic model employed by an organisation to tour, will influence the production model used to realise the exhibition.

## TEG defines a production model for touring exhibitions as:

*'The way you manage and attribute responsibility for the production of your exhibition'.*

i.e. the management or governance model, and who is responsible for doing what.

The final sections of the decision tree outline the range of economic and production models for UK touring that TEG has identified as part of its research, and the circumstances in which they might be most appropriate, and provides advice on the development of a touring strategy.

## 2 DECISION TREE

### BUILDING A TOURING STRATEGY



## 1. Defining your aims and objectives; why does your organisation want to tour exhibitions?

Your organisation's aims and objectives for touring exhibitions will influence the economic and exhibition production models it will be most appropriate to employ.

**Common aims and objectives for touring exhibitions include:**

- Increasing organisational profile
- Maximising the reach of exhibitions
- Increasing audience numbers
- Diversifying the audience
- To work in partnership
- To offset exhibition production costs
- To generate profit
- To access funding

**Discuss and consider your aims and objectives for touring exhibitions.**

**Prioritise your aims and objectives:**

- Which are most important to your organisation?
- Which help you to meet your wider organisational aims and objectives?

It is important to establish an order of priority for your aims and objectives, as it may not be possible to achieve them all through one project; some may not be compatible. For example, to diversify the audience for your exhibition, it may be required to travel to venues that are not able to afford hire fees or match-funding at a level needed to achieve full cost recovery.

**Summarise your aims and objectives in order of priority.**

## 2. What resources does your organisation have to support a touring exhibitions programme? What resources does it need?

Your organisation's ability to tour, and the extent and nature of the programme, is dependent on the resources available to support the activity. Assessing the range and quantity of resources available will help to set realistic, measurable goals as part of your exhibitions strategy, working towards the achievement of your aims and objectives.

**Resources include:**

- Financing
- Staff time
- Staff expertise
- Collections
- Exhibition build, kit and infrastructure
- Exhibition intellectual property

**Discuss and quantify your organisation's resources.**

**Discuss and quantify the additional resources - if any - you will require to achieve your aims and objectives for a touring exhibitions programme.**

For information about fundraising to support touring projects see section: Funding for Touring (page 22).

For information about financial, environmental, social and cultural sustainability see section: Sustainable Touring (page 43).

For information about increasing capacity through partnership working see section: Touring in partnership (page 55).

**Summarise your existing resources and those - if any - that you will be seeking to enable your organisation to tour.**

**Discuss and draft a plan for seeking the additional resources you require.**

## 3. What factors are influencing the sector currently?

A good understanding of the touring landscape, particularly within the thematic and geographical area in which you intend to (or do) tour, is essential to ensure that the exhibitions you develop, and partnerships you form, meet the needs of the market. This will also enable you to take advantage of funding and other opportunities.

**In addition to the individual strategic and practical needs of the organisations you may tour to and with, the work of the sector is influenced by the:**

- Funding environment
- Key performance indicators set by external agencies e.g. Arts Council England, Heritage Lottery Fund, a local authority
- Trends in good practice
- Strategic agendas of peer organisations, nationals, independents etc.
- Regional or national strategic agendas

For information about becoming sector aware see section: Sector Awareness (page 17).

**Referring to the Sector Awareness resource in section 3, starting on page 17, map out how much your organisation knows about touring and wider sector environment in which it intends to tour. Use this information to discuss and plan if and how you need to improve your sector awareness.**

**Devise a strategy for acquiring and maintaining the knowledge and understanding you need.**

It may be necessary to acquire this information before your organisation is able to select an economic and exhibition production model.

## 4. Selecting an economic model to tour

Which model is most suited to your touring programme or current touring project?

Touring exhibitions employ one of three economic models:

### Economic Models for Touring Exhibitions

Model	Definition	Case studies
Partial cost recovery	Income against the project covers a percentage of the total exhibition and tour costs	<p><b>Case Study 1:</b></p> <p><b>Exhibition:</b> Tim Shaw RA: Black Smoke Rising</p> <p><b>Organisations:</b> The MAC, Birmingham, with Aberystwyth Arts Centre</p> <p><b>Budget:</b></p> <ul style="list-style-type: none"> <li>• £5,000 each from each organisation from core funds</li> <li>• £29,500 raised by supporting the artist to make a Grants for the Arts ACE application</li> <li>• £9,000 raised from trusts and foundations</li> </ul> <p><b>Exhibition hire fee:</b> 50/50 division of costs</p> <p><b>Exhibition package:</b> Artworks and interpretation</p> <p><b>Exhibits:</b> Commissioned work</p> <p><b>Aims:</b></p> <ul style="list-style-type: none"> <li>• To share costs</li> <li>• To work in partnership; creating greater leverage to access funding</li> <li>• To support the development of the artist's career</li> </ul> <p><b>Case Study 2:</b></p> <p><b>Exhibition:</b> Mystery, Magic and Midnight Feasts: The Many Adventures of Enid Blyton</p> <p><b>Organisation:</b> Seven Stories, Newcastle</p> <p><b>Budget:</b></p> <ul style="list-style-type: none"> <li>• 60% core funds</li> <li>• 24% fund raised and sponsorship</li> <li>• 16% touring fees</li> </ul> <p><b>Exhibition hire fee:</b> £8,000 - £15,000 (for 3 months)</p> <p><b>Exhibition package:</b> Turn-key exhibition</p> <p><b>Exhibits:</b> Collection objects and commissioned interactives</p> <p><b>Aims:</b></p> <ul style="list-style-type: none"> <li>• Extending the reach of exhibitions</li> <li>• Off-setting the cost of exhibition production</li> <li>• Accessing additional funding</li> </ul>

Model	Definition	Case studies
Full cost recovery	Income against the project covers all of the exhibition and tour costs	<p><b>Case Study 1:</b></p> <p><b>Exhibition:</b> Sublime Symmetry: The Mathematical Devices Underpinning William De Morgan’s Fantastical Ceramic Designs</p> <p><b>Organisation:</b> De Morgan Foundation</p> <p><b>Budget:</b></p> <ul style="list-style-type: none"> <li>• £86,575 Esmeé Fairbairn grant</li> <li>• £580 Jonathan Ruffer Grant/Art Fund (curatorial research)</li> <li>• £800 London Mathematical Society</li> </ul> <p>All exhibition costs, including staff time, fundraised.</p> <p>Exhibition hire fee: Free</p> <p>Exhibition package: Turn-key exhibition</p> <p>Exhibits: Collection works</p> <p><b>Aims:</b></p> <ul style="list-style-type: none"> <li>• Ensure De Morgan Foundation meets priority to have collections on display whilst seeking new permanent base</li> <li>• Promote De Morgan through innovative research</li> <li>• Develop education programme encouraging use of visual arts to teach maths</li> <li>• Be able to offer the exhibition without a hire fee, to ensure it could travel to UK regions of low engagement in the arts</li> </ul> <p><b>Case Study 2:</b></p> <p><b>Exhibition:</b> The High Weald Hoard</p> <p><b>Lead organisation:</b> Brighton Royal Pavilion and Museums</p> <p><b>Budget:</b></p> <p>c. £50,000 grant from the HLF</p> <p>All exhibition costs covered and showing at five partner venues in East Sussex.</p> <p><b>Exhibition hire fee:</b> Free</p> <p><b>Exhibition package:</b> Turn-key exhibition</p> <p><b>Exhibits:</b> Collection objects</p> <p><b>Aims:</b></p> <ul style="list-style-type: none"> <li>• To provide wide public access to collection objects</li> <li>• To broaden the audience for the exhibition</li> <li>• To build on and develop partnerships between the venues</li> </ul>
For profit	Income against the project exceeds the cost of producing and touring the exhibition	<p><b>Case Study:</b></p> <p><b>Exhibition:</b> Brick Wonders</p> <p><b>Organisation:</b> UKLUG</p> <p><b>Budget:</b></p> <ul style="list-style-type: none"> <li>• Developed using core funds</li> </ul> <p><b>Exhibition hire fee:</b> £6,500 per month</p> <p><b>Exhibition package:</b> Turn-key exhibition</p> <p><b>Exhibits:</b> Created by exhibition developer</p> <p><b>Aims:</b></p> <ul style="list-style-type: none"> <li>• To cover all costs and generate profit</li> <li>• To raise the company’s profile</li> <li>• To work in partnership with the host venues</li> </ul>

**Taking into account your organisational aims and objectives, resources and the sector influencing factors that will affect your touring programme, review the models outlined and identify the most suitable approach.**

**If you elect to use the partial cost recovery model, discuss and agree the percentage of total costs that you will aim to recover.**

The partial cost recovery model is most commonly employed by UK organisations. This model requires the venue to partially subsidise the project. Currently, exhibitions touring between UK public venues rarely make a profit.

Monies to enable an organisation to tour will come from one or a combination of sources, including grants and sponsorship, hire fee income and core funds. For example an exhibition might achieve full cost recovery if it is fully subsidised by an external funder. Or full cost recovery might be realised through a combination of fundraising and hire fee income.

Budgetary practice varies significantly between individual museums and galleries, for example some organisations acknowledge all costs in their touring project budget, others only costs specific to touring e.g. packing and transport. How an organisation budgets, and allocates costs, can affect the model they are defined to be using i.e. the inclusion of fewer costs may appear to balance the budget. Organisations are encouraged to be aware of their budgetary practices and the real costs of touring.

## 5. Selecting an exhibition production model to tour

Which model is most suited to your touring programme or current touring project?

Touring exhibitions employ one of six production models:

### Production Models for Touring Exhibitions

Model	Definition
Single venue	An organisation produces a touring exhibition, and manages a tour to other venues
Reactive partnership	An organisation develops an exhibition on their own, another venue expresses an interest in hiring it and the exhibition is adapted to be shown at the other venue
Lead venue partnership	A lead venue manages a partnership between a number of organisations, sharing workload and costs in agreement, to develop an exhibition
Equal partnership	A group of venues form a partnership and share costs and workload equally, to develop an exhibition
Strategic partnership	A national or regional organisation works with a venue, or brings together a group of venues - through invitation, application or competition - to develop an exhibition, providing funding or/and project management, that realises their strategic objective e.g. access or audience development
Commercial partnership	A venue or group of venues works with a commercial exhibition touring company to develop and/or promote and manage an exhibition to tour

**Taking into account your organisational aims and objectives, resources, sector influencing factors and the economic model you have selected, review the exhibition production models outlined and identify the most suitable approach.**

## 6. Formulating a touring strategy

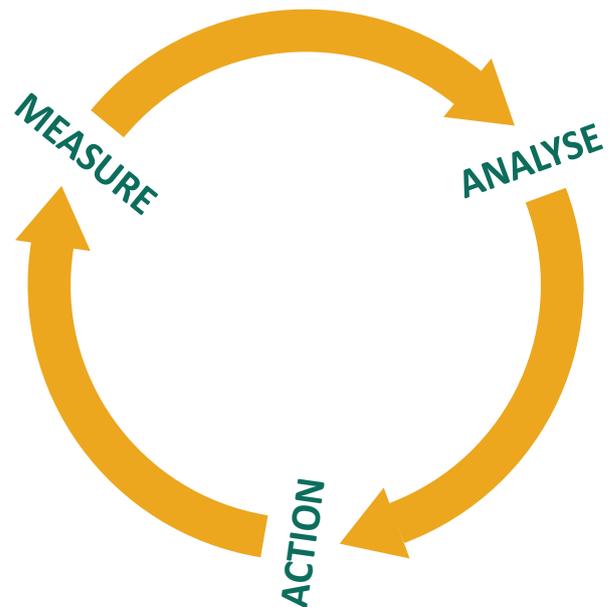
Your selected economic and exhibition production models should be identified in and underpin an organisational touring exhibitions strategy. Different models might be selected for use on different types of project, dependent on their aims, within a single strategy.

A touring exhibitions strategy should form part of a wider exhibitions strategy and the overall organisational strategy. A strategic approach embeds touring in an organisation's work, ensures its value is recognised and that success in achieving stated aims and objectives can be measured.

### A touring exhibitions strategy should:

- Outline the programme vision
- Define the working context e.g. regional, national, international
- Identify time-based strategic aims and objectives
- Describe the methods that will be used to achieve the vision
- Identify strengths and challenges
- Define roles and responsibilities
- Outline the schedule

To ensure a touring exhibitions strategy remains effective, organisations are encouraged to regularly:





# SECTOR AWARENESS RESOURCE

**Edited by:**

Charlotte Dew, Touring Exhibitions Group

Alice Lobb, Touring Exhibitions Group



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# 1 WHAT IS SECTOR AWARENESS?

- An interest in and an understanding of the wider environment in which your organisation operates.
- Appreciation of organisational culture, current policies and processes.
- Awareness of the need for professionalism, efficiency, cost-effectiveness, and the needs of audiences.
- Knowledge of the wider exhibition sector.
- Knowledge of changing factors that affect it.
- The ability to adapt and change in response to social, political and economic challenges.

## Why should I be sector aware?

- Be relevant
- Learn from others
- Have a sense of perspective
- Be able to engage with others
- Feel part of the sector
- React to change
- Know where to go/ who to ask for advice
- Make the most of opportunities
- Keep up to date

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*“Being ‘sector aware’ is something we often find difficult to prioritise on our ever growing To Do lists. By carving out small pockets of regular, focused time for this (subscribing to relevant newsletters, checking social media, attending events etc.) we can develop our sector awareness in a manageable and sustainable way. For me, professionally, dedicating regular time to developing sector awareness has brought me many benefits, including new collaborations, access to funding opportunities, increased awareness of sector trends and priorities, and access to professional development and support. In increasingly challenging times, I’ve also found that building my sector awareness inspires me and fuels my passion for working in touring.”*

*Dana Andrew, Working Internationally Project Coordinator*

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*“Maintaining an awareness of the sector’s priorities and opportunities, through networking and training, will equip your organisation to work strategically to access funding, develop partnerships and become more resilient.”*

*John Orna-Ornstein, Director of Museums, Arts Council England*

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## How do I demonstrate sector awareness?

- An interest in the sector that is relevant to your work.
- Understanding the needs and concerns of the individuals and organisations you work with or want to work with.
- Listening, questioning, verifying and explaining to broker a good working relationship.
- Being aware of how the current economic and political issues, nationally and internationally, affect the work of the sector.

### In the workplace...

**Creativity** - seeking different ways of doing things, having ideas and providing practical solutions to issues.

**Strategic awareness** - having an understanding of realistic aims and objectives, and knowing what is needed to be done to achieve them.

**Knowledge** - having solid information relevant to the organisation and the role and having the ability to research new information and use it.

## How do I become more sector aware?

### Know where you work!

- Read your organisation's strategy document, board reports, audience feedback.

### Keep up to date

- Look at the Arts sections of newspapers, Society Guardian, or Media Guardian, or the Times Educational Supplement, and any relevant professional journals such as The Museums Journal, Art Newspaper. Follow funders, local authorities and other organisations on Twitter.

## Know what's going on locally & nationally

- Read Arts Council England reports and funding announcements, research how organisations are funded and what their aims are before you approach them.

## Use experience gained from colleagues and peers

- Attending conferences, opening events, festivals, seminars, workshops and just visiting other museums and galleries can be an incredibly valuable way of learning what others have done, are doing or want to do in the future.
- Contribute to the effective working of your organisation by, for example, presenting your ideas within the context of the organisation's wider aims; demonstrate an understanding of the contribution and interdependence of your programme ideas.

**Cultural awareness** - be aware of the impact of practical, interpersonal and cultural issues on the success of your organisation.

**Ecological awareness** - think about the responsibilities an organisation has towards the community and the natural environment and how sustainability can be achieved.

## Make time

- Block out a couple of hours in your diary each month to read relevant journals and magazines.
- Block out half an hour in your diary each week to read e-newsletters, check bookmarked websites for updates and book yourself onto events.
- Take 10 minutes each day to check Twitter for relevant sector updates. Set up a separate work account if it makes it easier not to be distracted by other news!
- Having this up to date knowledge will save you time when it comes to justifying your work and attending events.

## 2 SCHEMES AND NETWORKS

Museums Association Touring Exhibitions Group  
Sustainable Exhibitions for Museums  
Association of Independent Museums Museums Journal  
The Art Newspaper Newsletters from Regional Museums  
Development Officers Regional Museum Development Events  
Culture Diary Museums Galleries Scotland Conference  
Regional Museum Federations Specialist Subject Networks  
JISC lists Museums Practice MUSCON  
Working Internationally Regional Project Twitter  
Art Fund Engage a-n University Museums Group  
Museum Computer Group NADFAS  
British Association of Friends of Museums Arts Marketing Association British Council  
Museums and Heritage Advisor National Museums Directors' Council  
Association of Independent Museums'  
Museums and Heritage Advisor Newsletters Arts Council England TEG Marketplace  
Contemporary Art Society Arts Council Collection Curators Days  
Creative Scotland Arts Council of Wales Arts Council of Northern Ireland  
Museums Galleries Scotland Ecsite International Council of Museums  
Frieze Liverpool Biennial Glasgow International Edinburgh Festival  
London Design Festival Kids in Museums Culture 24  
Museums at Night Chartered Institute of Library and Information Professionals  
Archives and Records Association Local Government Association  
Arts and Humanities Research Council  
Reading Agency International Council of Museums Group for Education in Museums  
Rural Museums Network Artsadmin  
Collections Trust Axis Artists



# FUNDING FOR TOURING

**Edited by:**

Charlotte Dew, Touring Exhibitions Group  
Faye Clews, Development Partners

**Contributors:**

Sue Barnard, Arts Council England  
Devon McHugh, Museums Galleries Scotland  
Suzanne Lyle, Arts Council of Northern Ireland  
Chris Bailey, Northern Ireland Museums Council  
Fiona Talbott, Heritage Lottery Fund

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# 1 INTRODUCTION

This resource outlines a range of public and private funding sources to support touring exhibitions. Dependent on the scale and nature of your touring programme, you may need to assemble a portfolio of funders from the public and private sector to support your project. Monies from independent grant-giving bodies and sponsors can be used to match fund applications for public money. For this reason it may be appropriate to apply to one or some of these bodies in advance of making an application for public funds.

It is important to plan your strategy and approach to fundraising carefully; have a clear project outline and vision for what you are looking to achieve, as well as all of the **specific costs**. It is also key to research the priorities and requirements of each funder before applying, to ensure your eligibility. Be creative in your thinking; partnership can often open up eligibility for funds that would not otherwise be available, for example working with an academic organisation, or including a strong audience development or educational element in your programme. For larger projects it may be appropriate to employ a fundraiser on a freelance or temporary basis, to assist with this process. For details of fundraisers with arts and heritage experience, see the Suppliers Directories of the Association of Independent Museums [www.aim-museums.co.uk](http://www.aim-museums.co.uk) or the Museum Association [www.museumassociation.org](http://www.museumassociation.org)

**The following organisations and resources provide up-to-date information, and in some instances advice and training regarding funding sources and approaches, to assist you in developing your fundraising plan:**

Association of Independent Museums:  
[www.aim-museums.co.uk](http://www.aim-museums.co.uk)

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Foundation for Social Improvement (FSI) provides fundraising support to small charities (with an annual turnover of less than £1.5 million), including free training and workshops: [www.thefsi.org](http://www.thefsi.org)

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Funding Central - a grants database free to organisations with a turnover of less than £100,000, managed by the National Council for Voluntary Organisations, funded by the Office for Civil Society [www.fundingcentral.org.uk](http://www.fundingcentral.org.uk)

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Funds Online - this subscription-based website aims to link charities to 8,000 funders. Charities can subscribe to different packages, ranging from accessing funding information about trusts, corporate donors, and national and international government sources. The website has been developed by combining data from four previous

website databases run by the Directory of Social Change: Trustsfunding, Governmentfunding, Companygiving and Grantsforindividuals: [www.fundsonline.org.uk](http://www.fundsonline.org.uk)

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GRANTfinder - UK's leading grants database (subscription based): [www.grantfinder.co.uk](http://www.grantfinder.co.uk)

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The Institute of Fundraising is a professional membership body for UK fundraising. Their website contains resources and guidance for heritage organisations and charities: [www.institute-of-fundraising.org.uk](http://www.institute-of-fundraising.org.uk)

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LinkedIn - if you have a LinkedIn profile, you can join LinkedIn Groups run by the Institute of Fundraising, the Museums Association and the Philanthropy Network. These offer news, ideas and forums for discussion: [www.linkedin.com](http://www.linkedin.com)

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Museums Association funding news: [www.museumassociation.org/area-of-work/fundraising](http://www.museumassociation.org/area-of-work/fundraising)

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Third Sector has information, advice and training for voluntary and not-for-profit organisations: [www.thirdsectorevents.com](http://www.thirdsectorevents.com)

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## Museum Development Offices

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The regional Museum Development Offices, funded by Arts Council England, have knowledgeable staff who can help you get to grips with local funding opportunities. They sometimes run grant schemes of their own; it is worth investigating what is available at the time you are seeking funding. Links to the Museum Development Offices around the country are available from the Museum Development Network website:

[www.museumdevelopmentnetwork.org](http://www.museumdevelopmentnetwork.org)

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**East of England:** [www.sharemuseumseast.org.uk](http://www.sharemuseumseast.org.uk)

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**East Midlands:** <http://mdem.org.uk/>

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**West Midlands:** <http://mdwm.org.uk>

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**London:** [www.museumoflondon.org.uk/supporting-london-museums](http://www.museumoflondon.org.uk/supporting-london-museums)

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**North East:**

<https://museumdevelopmentne.org.uk>

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**North West:** <https://museumdevelopmentnorthwest.wordpress.com/>

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**South East:** [www.southeastmuseums.org/](http://www.southeastmuseums.org/)

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**South West:** [www.southwestmuseums.org.uk/](http://www.southwestmuseums.org.uk/)

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**Yorkshire:** [www.museumdevelopmentyorkshire.org.uk](http://www.museumdevelopmentyorkshire.org.uk)

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## Regional Museum Federations

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Museum Federations represent and support the museums and galleries in their region. They provide resources, co-ordinate training programmes and run small grants programmes for training, and in some cases support accreditation and research.

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**Midlands Federation of Museums and Art Galleries:**

[www.midfed.org](http://www.midfed.org)

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**North West Federation:** [www.nwfed.org.uk](http://www.nwfed.org.uk)

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**Scottish Museums Federation:**

[www.scottishmuseumsfederation.org.uk](http://www.scottishmuseumsfederation.org.uk)

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**South and East Museums Federation:**

[www.semfed.org.uk](http://www.semfed.org.uk)

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**South Western Federation of Museums and Art Galleries:**

[www.swfed.org.uk](http://www.swfed.org.uk)

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**Welsh Museums Federation:**

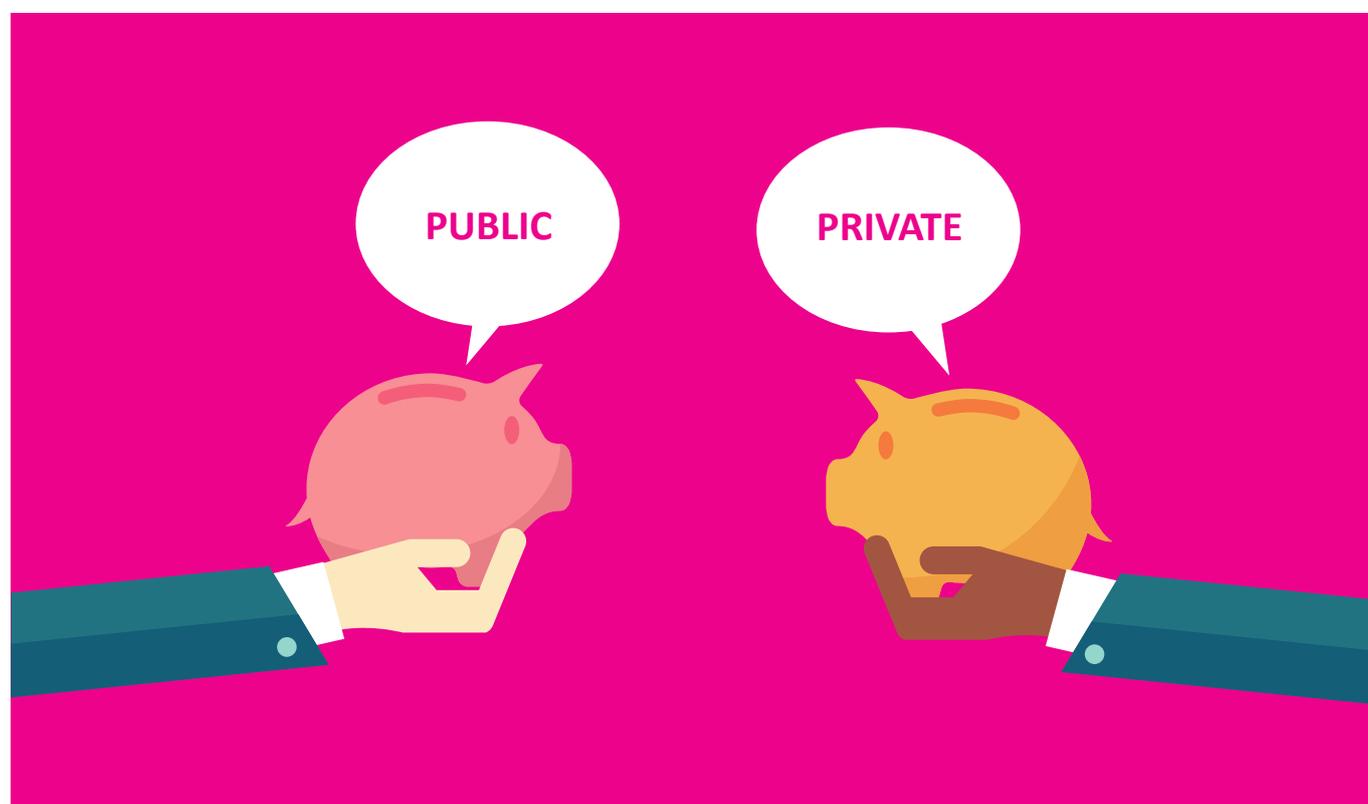
[www.welshmuseumsfederation.org](http://www.welshmuseumsfederation.org)

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**Yorkshire and Humberside Federation of Museums and Art Galleries:**

[www.yhfed.org.uk](http://www.yhfed.org.uk)

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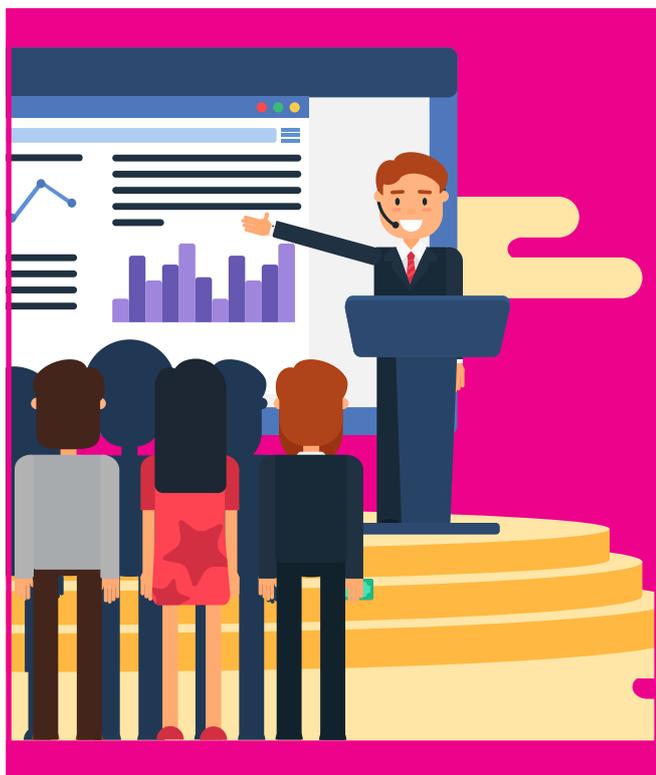
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## Funding Fairs

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Funding fairs are events attended by a number of funding organisations. They present an opportunity to seek advice on funding options in an informal atmosphere. They are often attended by the Heritage Lottery Fund, the Arts Council, regional development offices and major grant-making trusts. There are usually workshops that take place at the fairs which provide structured guidance through funding procedures. Find out what is available locally through your local Museum Development Office or via the news section of the Heritage Lottery Fund website.

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## Conferences and Training

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A number of organisations deliver annual conferences which cover a range of topics including fundraising. The Association of Independent Museums has a three day conference every summer; the Museums and Heritage show takes place over two days in late spring and the Museums Association conference takes place over three days in the autumn. Representatives of the Heritage Lottery Fund and Arts Council would usually attend these events.

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The Arts Council funds the Arts Fundraising and Philanthropy Programme, with the aim of transforming fundraising across the arts and cultural sector. They run a week long National School for Arts Fundraising and Leadership as well as a series of training days. [www.artsfundraising.org.uk](http://www.artsfundraising.org.uk)

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The Institute of Fundraising runs one day courses on a range of useful topics, though not specifically targeted at arts or heritage. They also offer longer courses leading to a Certificate or Diploma in fundraising. [www.institute-of-fundraising.org.uk](http://www.institute-of-fundraising.org.uk)

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If you are attached to an educational institution, such as a university or college, the CASE Europe training programme may be useful. They have a series of fundraising workshops and a residential one week course known as the Spring Institute in Educational Fundraising [www.case.org](http://www.case.org)

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## 2 FUNDING: PUBLIC MONEY

**Public funding in the UK is distributed by a number of organisations including Arts Council England, Creative Scotland, Arts Council of Wales, Arts Council of Northern Ireland and the Heritage Lottery Fund.**

### Arts Council England

**Arts Council England has a number of funding programmes that may support touring activities.**

#### National Lottery Project Grants

These grants support arts, museums and libraries projects. Accredited museums and galleries can apply for a range of museum projects which includes applications for touring or loaning historic or contemporary collections and objects. Applications for this open access funding programme can be made throughout the year. The fund is open to individuals, for example artists, curators, writers, producers and organisations including arts organisations, museums and libraries, regional or national. National Portfolio Organisations can partner on applications, although they can only apply as the lead applicant for applications over £100,000 which meet additional criteria. More information can be found on the Arts Council website. Grants can be made for projects with costs of between £1,000 and £100,000. Applicants need to find a minimum of 10% of the total project budget from other sources. This can include both cash match and support in kind. Activities should be project based and happen in a defined period of time up to a maximum of three years. Decisions are made in six weeks for applications of £15,000 and under, and in twelve weeks for those for over £15,000. For projects touring to two or more areas, decisions are made at a national level alongside other national applications. For projects taking place in one Arts Council area, decisions are made in the area the applicant is based in.

Two of the criteria against which applications are assessed are quality of activity and public engagement. Applicants should include details of relevant work and experience, the aim of the project including the ideas behind it, how it will develop the applicant's work and if appropriate the work of others. Audience development is a key requirement for all applications.

Applicants should state who will engage with the project, how people will engage and in what ways e.g. as an audience member or participant, what experience you want them to have and details on how those people will be reached. Exhibitions may tour in one or more Arts Council England areas. Projects that increase opportunities for reaching audiences in areas with lower arts and cultural activities are supported.

Museums can also apply for arts-specific projects. This could include innovative opportunities for artists to create work in new settings, inspired by a range of subject matters, for example interpreting collections. Projects may increase public engagement through cross-fertilisation of audiences, for example between contemporary art and museum audiences?

#### **When planning and submitting an application, applicants are advised to:**

- Register on Grantium, the Arts Council's online application portal
- Discuss the project with the Arts Council customer services team or appropriate person in the Arts Council office in their area
- Include a tour schedule with a rationale for the choice of venues with as many venues confirmed as possible
- Explore partnership opportunities, both as collaborators and as funders
- Build in opportunities for participatory activities where appropriate
- Consider including an audience development plan which includes details for all venues, not just for the originating exhibiting venue. This is mandatory for applications over £100,000
- Demonstrate that there is a robust evaluation plan for the whole tour

**To find out more, contact Arts Council Customer Services in the first instance:**

0161 934 4317  
enquiries@artscouncil.org.uk  
[www.artscouncil.org.uk](http://www.artscouncil.org.uk)

Through Arts Council Development FUNDS, different funding programmes are open throughout the year.

Developing Your Creative Practice supports individual artists, creative practitioners and those working in museum practice to make a step change in their career. The fund is only open to individuals, and not individuals applying on behalf of organisations. Whilst touring applications are not eligible, the programme is designed to open more pathways for practitioners looking to develop activity in new areas which may lead to a future tour.

Check the Arts Council website for current open programmes.

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## Creative Scotland

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Funding from Creative Scotland is available through one strand - Open Project Funding, which supports a broad range of activity, including touring exhibitions and programmes. Projects should benefit audiences in Scotland, and where possible the distribution of exhibitions outside of the major cities (although not exclusively). Funding for co-commissioning and touring of individual works is also available, but historic or heritage focused exhibitions are not supported.

Applications for Open Project Funding can be made by organisations or individuals. You can apply for funding from £1,000 to £100,000. Applications for £100,000-150,000 are accepted with prior written approval. Open Project Funding is a continuous programme, so applications can be submitted at any time throughout the year and there are no deadlines. Applications of up to £15,000 will receive a response within eight weeks and for sums of above £15,000, a response within 12 weeks.

Creative Scotland also have their own fund for individuals or companies based in Scotland which have presented a professional piece of theatre, dance or music at the Edinburgh Festival Fringe.

**To find out more, contact or visit:**

0845 603 6000  
enquiries@creativescotland.com  
[www.creativescotland.com/funding/funding-programmes/open-project-funding](http://www.creativescotland.com/funding/funding-programmes/open-project-funding)

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## Museums Galleries Scotland

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Funding is available through two of Museums Galleries Scotland's funding streams. Grants for the Small Project Fund (£500-£5,000) are for projects that support museums to develop in line with the aims of The National Strategy for Scotland's Museums and Galleries. Grants from the Museum Development Fund (£5,000-£40,000) are available for projects that increase the impact of Scotland's Museums and Galleries and which help your organisation make the strategic steps towards becoming more resilient.

Applications must be submitted by organisations running Accredited museums in Scotland. The Small Project Fund has three rounds of funding a year; dates are available on the MGS website along with announcement dates which tend to be within 7 weeks of the fund closing date.

The Museum Development Fund has two rounds of funding a year, in spring and autumn; dates are available on the MGS website. Announcements tend to be made within 2 months of the closing date.

**To find out more, contact or visit:**

0131 550 4115  
investment@museumsgalleriesscotland.org.uk  
[www.museumsgalleriesscotland.org.uk/funding](http://www.museumsgalleriesscotland.org.uk/funding)

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## Arts Council of Wales

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Grants from the Arts Council of Wales are divided into two strands; funding for organisations and funding for individuals; applications to support touring exhibitions and programmes can be made through both strands.

**All applications for funding have to meet the Arts Council of Wales' strategic challenges:**

- How we encourage more people in Wales to choose to engage with the arts
- How we make innovative and imaginative use of digital technologies
- How we develop the creativity of children and young people
- How the arts and culture of Wales connect internationally, and
- How we embed the principles of sustainable development into our creative and business practices

**Applications should also take account of the following principles held by the Arts Council of Wales:**

- “Wales is a bilingual nation and we expect people to be able to engage with the arts in the language of their choice, whether as audience, participant or artist. We expect you to reflect this appropriately in your application.
- We want the arts in Wales to be more inclusive and engaging, so we want the organisations that we fund to embed the principles of equality and diversity in all that they do. Tell us how your project will tackle barriers to engagement and reach out to the widest possible audience.
- We want to invest in work that excites and inspires. We’ll always want to support those projects that exemplify the best of the arts - those characteristics which mark the work out as distinctive, relevant, compelling and enduring. Make sure you show us in your application how your project stands out from the crowd.”

The amount of money that can be applied for, as a proportion of the overall budget, alters according to the type of organisation, and specific circumstances: download the ‘Getting Started’ document from: [www.artscouncilofwales.org.uk/what-we-do/funding/apply/organisations](http://www.artscouncilofwales.org.uk/what-we-do/funding/apply/organisations), for more information.

### Grants are divided into three types:

Small Grants of £250-£5,000  
 Large Grants £5,001-£30,000  
 Partnership Funding (up to 75% of total costs).

In 2019 Arts Council Wales will be temporarily closing their Small and Large Grant programmes to review their Lottery Funding. The Small Grants programme is a rolling programme and you can apply any time before 10th July 2019. The Large Grants programme has one deadline: 8th May 2019: [www.artscouncilofwales.org.uk/what-we-do/funding/apply](http://www.artscouncilofwales.org.uk/what-we-do/funding/apply)

### Funding will only be granted if:

- The project is taking place in Wales
- It is in addition to the usual programme of activity
- It is time limited
- It has a start date that provides sufficient planning time
- There is a partnership of match funding, or a specified proportion, dependent on the applicant

Funding is divided into types of activity; touring projects are most likely to fall under the production strand, but dependent on their focus, could also be considered within other strands such as the audience development strand.

The following information is provided by the Arts Council of Wales in connection to the Production strand:

“We want to fund the production of work that is innovative and compelling. We’re particularly interested in the new and contemporary; in work that seeks out and engages wider audiences.

Wales’ standing as an artistic nation will be defined by the quality of the work we support through this strand. It is vital support as it enables venues and galleries to programme a diverse range of exemplary work that originates from Wales.

We want audiences across Wales to be able to access the very best arts activity, so the artistic work we support must be suitable for presentation in Wales’ arts centres, galleries, theatres and concert halls, either as part of a tour or at a single venue or gallery. We can also support site-specific and outdoor work.

We also want to support what we call ‘national touring’ projects, which means that you must tour to at least one venue or gallery in three out of four regions of Wales.

We want to support productions in any artform, (as well as in cross-artform work such as circus), that demonstrate they will be of high quality and have a clear, artistic vision.

### We will not support:

- Projects that have not sufficiently considered the audiences they are trying to reach, or any barriers that might prevent them engaging
- Projects that have not demonstrated a commitment to deliver high quality work”

### To find out more, contact or visit:

0845 8734 900  
[grants@arts.wales](mailto:grants@arts.wales)  
[www.arts.wales/funding](http://www.arts.wales/funding)

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## Arts Council of Northern Ireland

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The Arts Council of Northern Ireland's Small Grants Programme is suitable for touring activities. It aims to assist organisations to deliver arts projects which contribute to the growth of arts in the community for new and existing audiences and which reflect the diversity of Northern Ireland's society and culture.

Funding is expected to support activities which benefit the people of Northern Ireland or that help arts organisations in Northern Ireland carry out their work. All applications should fit within the objectives stated in the Council's five year plan and within its artform policies.

**Further information on Arts Council Northern Ireland's schemes can be obtained from:**

028 9262 3555

[info@artscouncil-ni.org](mailto:info@artscouncil-ni.org)

<http://artscouncil-ni.org/funding>

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## Northern Ireland Museums Council

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Northern Ireland Museums Council is the lead body for the support and development of local museums in Northern Ireland and the principal advocate for the sector. NIMC is the main conduit for the government's support for non-national museums, receiving funding from the Northern Ireland Assembly through the Department of Communities.

NIMC administers the Museum Accreditation Scheme; provides information, advice and training to museums across a range of activities, such as curatorial practice, collections management, conservation services, learning and engagement, marketing and income-generation; delivers projects in partnership with museums; carries out developmental research; and provides grants for all aspects of museum operations and services including the development and touring of exhibitions. All NIMC grant programmes are currently closed.

**For the latest updates visit:**

[www.nimc.co.uk/grants](http://www.nimc.co.uk/grants)

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## Heritage Lottery Fund

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Following public consultation in 2018 the Heritage Lottery Fund has changed its name to **The National Lottery Heritage Fund** to better reflect the contribution of National Lottery players to its funding, and reorganised how that funding is awarded as part of a new five-year Strategic Framework (2019-2024).

The National Lottery Heritage Fund (the Fund) is the largest dedicated funder of heritage in the UK. They distribute National Lottery grants to projects that connect people and communities to the national, regional and local heritage of the UK.

The vast majority of their funding will now be delivered through the '**National Lottery Grants for Heritage**', an open programme for any type of heritage project from £3,000 to £5million. They have simplified their application processes and requirements, including introducing single-round grants up to £250,000.

They have further devolved funding decisions across the UK. For the first time all funding decisions up to £5million will be decided by committees and senior staff in Scotland, Northern Ireland, Wales and three geographical areas in England – North; Midlands & East; and London & South. The UK Board will still decide on major awards over £5million.



## National Lottery Project Grants

	£3,000 to £10,000	£10,000 to £100,000	£100,000 to £250,000	£250,000 to £3,000,000
<b>Suitable for</b>	Not-for-profit organisations Private owners of heritage	Not-for-profit organisations Private owners of heritage and partnerships	Not-for-profit organisations Partnerships led by not-for-profit organisations	Not-for-profit organisations Partnerships led by not-for-profit organisations
<b>Before you apply</b>	-	-	-	You have to submit an 'Expression of Interest' form, and only then will you be invited to apply
<b>Project length</b>	Up to one year	Up to five years	Up to five years	Development phase up to two years Delivery phase up to five years
<b>Deadlines</b>	No deadlines - apply whenever you are ready	No deadlines - apply whenever you are ready	Deadlines are quarterly. <b>In 2019:</b> 5 March 28 May 20 August 19 November  Decisions 3 to 4 months later	Deadlines are quarterly. <b>In 2019:</b> 5 March 28 May 20 August 19 November  Decisions 3 to 4 months later
<b>Assessment process</b>	NLHF will assess your application and give you a decision in eight weeks	NLHF will assess your application and give you a decision in eight weeks	NLHF will assess your application in 12 weeks, and following assessment it will be assigned to a quarterly committee meeting.	NLHF will assess your application in 12 weeks, and following assessment it will be assigned to a quarterly committee meeting.
<b>Your contribution</b>	-	-	You must contribute at least 5% of your project costs.	You must contribute at least 5% of your project costs for grants up to £1m, and at least 10% for grants of £1m or more.

### Your touring exhibition

The Fund's new framework offers more flexibility to organisations wanting to fund their touring exhibition. An application could centre on the production of a touring exhibition as well as a programme of activities to accompany it. Another possibility is that the host venue for a touring exhibition could seek funding for new or additional activities to accompany the exhibition. Or perhaps, as in the case study below, your touring exhibition forms one part of a larger project.

**CASE STUDY:** In 2015 Shape Arts received a grant of £853,600 from the Heritage Lottery Fund for their National Disability Arts Collection and Archive project. With the funding they created a digital archive, an interactive website, a learning programme and touring exhibitions which documented and shared the history of the Disability Arts Movement.

Whatever your project is, the Fund states that it must: have a clear plan with a defined start, middle and end; have not already started; last a certain amount of time (proportional to the grant amount); contribute to achieving the Fund's outcomes.

The Fund's outcomes are changes, impacts or benefits that happen as a direct result of your project. All of the projects they fund will achieve one or more of these outcomes. The number of outcomes you achieve will depend on what you want to deliver and should be proportionate to the size of grant you are requesting or the specific focus of your project. The Fund expects projects to achieve some outcomes more strongly than others. You should plan to focus on the outcomes that are strongest, as they will monitor your progress against these and you will use them to evaluate the change your project has made. However all projects must achieve the **'wider range of people will be involved in heritage'** outcome as a minimum.

### The Fund outcomes are:

- A wider range of people will be involved in heritage (mandatory outcome)
- Heritage will be in better condition
- Heritage will be identified and better explained
- People will have developed skills
- People will have learnt about heritage, leading to change in ideas and actions
- People will have greater wellbeing
- The funded organisation will be more resilient
- The local area will be a better place to live, work or visit
- The local economy will be boosted

### Heritage Campaigns

Alongside National Lottery Grants for Heritage, NLHF will run Heritage Campaigns with the intention of fulfilling identified strategic needs or funding gaps; creating opportunities for advocacy and strategic leadership; stimulating innovation; and bringing new sources of expertise, audiences and resources for heritage through partnerships. Each campaign will be time-limited and have a clear geographical reach (UK-wide, national or local).

### Inclusive heritage

Inclusivity is a key priority for the Fund; their only mandatory outcome is focused on inclusion and ensuring a wider range of people can access your heritage. This is obviously a strength for touring exhibitions and associated activity. The Fund has a particular focus on reaching the under-represented (in heritage) and as such they encourage applications from organisations that work with, or seek to benefit:

- Disabled people
- Young people
- People from minority ethnic and LGBT+ communities
- People from lower socio-economic backgrounds

They also intend to address under-representation in their funding of geographical areas in the UK, and have identified 13 local authority areas that are priorities for support and funding. See the website for further information.

### Message from the National Lottery Heritage Fund

“Under our new funding framework we want to encourage a range of high quality projects that demonstrate the difference that National Lottery funding makes to heritage, people and communities. We hope that the Touring Exhibitions Group can continue to use the Fund to support your work and bring a wider range of heritage to a wider range of people”.

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### Local authorities

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The current economic climate is causing uncertainty in local authority funding; some grant schemes are closing and others have declining pots to draw from. In many regions, however, funding remains available for projects that boost tourism and economic prosperity or have significant educational merit. Levels and types of funding vary a great deal between districts and counties, but it is always worth researching what is available locally. District Councils often have a community grant scheme that provides funding. County Councils tend to give responsibility to their Councillors to find and champion projects, so it is worth getting to know your local representative.

High profile touring exhibitions may be funded directly by the local council in a particular location if they believe that it will bring tourists into their area. Councils will also draw on core budgets for tourism, education or the arts when they feel that project outcomes are particularly strong. This level of funding will only be accessed through advocacy and a really compelling case.

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### Arts and Humanities Research Council

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Partnering with other types of organisations may enable you to draw on funding not otherwise available. Working with a University or a large museum with IRO status (Independent Research Organisation), for instance, could enable access to AHRC funding, with your exhibition providing an output and dissemination opportunities for University-led research:

[www.ahrc.ukri.org/funding/research/museumsandgalleries](http://www.ahrc.ukri.org/funding/research/museumsandgalleries)

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## 3 FUNDING: TRUSTS, GRANT-GIVING BODIES AND FOUNDATIONS

There are a large number of trusts, grant-giving bodies and foundations; the following represent a number of those that have an arts and/or heritage focus. Their work and funding programmes are not specifically focused on touring exhibitions, but applications to one or more may bring together a portfolio of funders, who can support the realisation of a touring programme. For example, you may look to one funder to cover conservation costs, another to acquire a work for inclusion in the exhibition, and a further organisation to cover production costs or research. Raising monies through one or more of the following sources can help the success of an application for public funds, from a relevant funding body, as this brings match funding to the table.

A brief introduction to each organisation is provided, together with a link to their website, to ensure that you are accessing the most up-to-date information about their programmes:

### The Altajir Trust

This is a UK based charity supporting exhibitions, publications and educational activities related to Islamic culture and Muslim/Christian relations:

[www.altajirtrust.org.uk](http://www.altajirtrust.org.uk)

### Association of Independent Museums (AIM)

AIM operates five grant schemes to help members with sustainability, conservation, preventive conservation and training.

[www.aim-museums.co.uk/for-aim-members/grants](http://www.aim-museums.co.uk/for-aim-members/grants)

### Art Fund

Art Fund is the national charity for art. It helps museums and galleries in the UK to develop their collections and put them at the service of a wide range of visitors and communities. They offer grants towards acquisitions, to support curatorial practice or projects and to facilitate the lending, borrowing, display and sharing of collections.

Art Fund is independently funded, with the core of its income provided by 151,000 members who receive the National Art Pass. Support also includes a range of digital platforms and marketing activity to help museums reach new audiences. [artfund.org/supporting-museums](http://artfund.org/supporting-museums)

### The Baring Foundation

The Baring Foundation's arts funding programme focuses on participatory arts with people over 60 and usually those facing disadvantage or discrimination. Much of their work takes place in partnership with others; they have funding relationships with all four Arts Councils in the UK. Grants are made by invitation, unless an open programme is advertised on their website:

[www.baringfoundation.org.uk](http://www.baringfoundation.org.uk)

### Beecroft Bequest

Administered by the Museums Association, a grant-in-aid programme for art galleries and museums in the British Isles towards the purchase of pictures and works of art (furniture or textiles can be considered) not later than the 18th century in date:

[www.museumsassociation.org/funding/beecroft-bequest](http://www.museumsassociation.org/funding/beecroft-bequest)

### Charles Hayward Foundation

The Charles Hayward Foundation is a grant-making charitable trust making awards to charities that are registered in the UK, within the following categories: Social & Criminal Justice, Heritage & Conservation and Older People. They have a particular interest in industrial heritage. They do not fund the performing arts, community arts centres, academic institutions and art and history workshops:

[www.charleshaywardfoundation.org.uk](http://www.charleshaywardfoundation.org.uk)

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### City of London Archaeological Trust

The trust's purpose is to support and initiate archaeological work in the City of London and its environs. It supports all kinds of archaeological work and the exhibition of archaeological sites: [www.colat.org.uk](http://www.colat.org.uk)

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### Clothworkers' Foundation

The Clothworkers' Foundation's main programme supports capital costs of projects that benefit disadvantaged people. They do not fund salaries or other project expenses and exclude arts projects that do not work exclusively with the groups of people described on their website. [www.clothworkersfoundation.org.uk](http://www.clothworkersfoundation.org.uk)

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### Clore Duffield Foundation

The Clore Duffield Foundation is a grant-making charity which concentrates its support on cultural learning, creating learning spaces within arts and heritage organisations, leadership training for the cultural and social sectors, social care, and enhancing Jewish life: [www.cloreduffield.org.uk](http://www.cloreduffield.org.uk)

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### The Colwinston Trust

The Colwinston Trust distributes grants to UK registered charities working predominantly in the areas of opera, music and the visual arts. The funding is primarily directed towards the support of activity that benefits Wales. The Trust is especially interested in projects that demonstrate excellence in the relevant field. Collaborative work, and high quality projects that help young people to better appreciate the possibilities the arts can offer, and those that aim to improve access and understanding of the art form are also of particular interest. [www.colwinston.org.uk](http://www.colwinston.org.uk)

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### The Daiwa Anglo-Japanese Foundation

The foundation's purpose is to support closer links between Britain and Japan. It does this by making grants to promote links between the UK and Japan in all fields of activity including exhibitions. [www.dajf.org.uk](http://www.dajf.org.uk)

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### Daphne Bullard Trust

Administered by the Museums Association, the Trust promotes the work of dress and costume conservation, display and publication. The Trust considers applications from students of or persons engaged in the conservation and study of dress and textiles of any period and their display. Preference will be given to projects aimed at conservation or display of dress or textiles where there is a long-term material benefit to a collection or project: [www.museumsassociation.org/funding/daphne-bullard-trust](http://www.museumsassociation.org/funding/daphne-bullard-trust)

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### Drapers' Charitable Fund

The Drapers' Company promotes its textile heritage through support for textile conservation, display and public access. It also funds museums relating to the armed forces or history of London: [www.thedrapers.co.uk/Charities/Grant-making-trusts/The-Drapers-Charitable-Fund.aspx](http://www.thedrapers.co.uk/Charities/Grant-making-trusts/The-Drapers-Charitable-Fund.aspx)

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### John Ellerman Foundation

The John Ellerman Foundation funds regional museums and galleries through one annual call for major projects which demonstrate excellence, national significance and a commitment to broadening audiences. They put a particular emphasis on the development of curatorial skills and will not fund individual conservation projects or education / outreach projects. This programme is currently closed to applications and an announcement will be made in mid 2019 about when it will re-open.

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### The Elephant Trust

The Elephant Trust was created in 1975 by Roland Penrose and Lee Miller with a view to develop and improve the knowledge, understanding and appreciation of the fine arts in the United Kingdom; to make it possible for artists and those presenting their work to undertake and complete projects when frustrated by lack of funds. It is committed to helping artists and art institutions/galleries that depart from the routine and signal new, distinct and imaginative sets of possibilities. They fund the making or producing of new work or exhibitions, but do not fund what they refer to as 'Group Exhibitions' or 'Arts Festivals': <http://elephanttrust.org.uk/docs/intro.html>

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## Ernest Cook Trust

The Ernest Cook Trust is an educational charity, focusing on the environment, the countryside, the arts (in the broadest sense) and science. The Trust actively encourages children and young people to learn from the land through hands-on educational opportunities on its estates and by offering grants:

<http://ernestcooktrust.org.uk/>

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## Esmée Fairbairn Foundation

This foundation supports the revenue costs of arts projects which cover their three priorities:

- Organisations at a pivotal point – organisationally or artistically
- Development of emerging talent
- Art as an instrument for social change, community cohesion or participation

[www.esmeefairbairn.org.uk](http://www.esmeefairbairn.org.uk)

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## Esmée Fairbairn Collections Fund

This funding strand is run by the Museums Association and focuses on time-limited collections work outside the scope of an organisation's core resources. Eligible projects are research into collections, conservation, collections reviews and initiatives to develop the use of collections.

[www.museumsassociation.org/collections/18022011-esmee-fairbairn-collections-fund](http://www.museumsassociation.org/collections/18022011-esmee-fairbairn-collections-fund)

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## Foyle Foundation

The Foyle Foundation is an independent grant making trust that distributes grants to UK charities, supporting arts, learning and libraries. The Foundation seeks applications that make a strong artistic case for support in either the performing or visual arts. The Arts programme has a twofold purpose, to help sustain the arts and to support projects that particularly help to deliver artistic vision. They look for value for money, long term benefit and sustainability in projects. The minimum grant is £10,000. Typical areas of support include:

- helping to make the arts more accessible by developing new audiences, supporting tours, festivals and arts educational projects;
- encouraging new work and supporting young and emerging artists;
- building projects that improve or re-equip existing arts venues (rather than construction of new facilities, although this will not be excluded);
- projects that encourage sustainability by reducing overheads or which help generate additional revenue:

[www.foylefoundation.org.uk](http://www.foylefoundation.org.uk)

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## Garfield Western Foundation

The Garfield Western Foundation supports approximately 1,500 charities across the UK each year; grants made by the Foundation range from the smallest community and volunteer projects through to large national organisations. Despite the diversity of organisations and projects the Foundation funds, the common themes are charities that demonstrate quality and excellence with projects that have clear outcomes and benefits, good leadership and sensible business plans:

[www.garfieldweston.org](http://www.garfieldweston.org)

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## The Golsoncott Foundation

An arts-funding trust, its declared object is: 'to promote, maintain, improve and advance the education of the public in the arts generally and in particular...the fine arts and music.' The trustees' overriding concern is to support those projects that demonstrate and deliver excellence in the arts. [www.golsoncott.org.uk](http://www.golsoncott.org.uk)

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## The Grocers' Charity

In the heritage and arts category, this grant-maker funds the conservation of historic buildings, objects and paintings and the improvement of accessibility to arts projects, performances or exhibitions.

[www.grocershall.co.uk](http://www.grocershall.co.uk)

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## Headley Trust

The Headley Trust awards grants to proposals that match to one of the following areas of interest: regional museums and galleries, with special consideration for curatorial support and acquisitions; the display, study and acquisition of British ceramics; conservation of industrial, maritime and built heritage; archaeology; major museums, galleries and libraries (not normally large capital projects); crafts (including rural crafts); arts education/outreach and access to the arts for disabled and disadvantaged people:

<http://www.sfct.org.uk/Headley.html>

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## Henry Moore Foundation

The Foundation concentrates its support on sculpture. These aims are achieved through specific projects initiated by the Foundation and by giving grant aid to primarily not-for-profit organisations. It awards grants in five categories: new projects, collections, research and development, fellowships and conferences, lectures and publications. They will fund exhibitions and exhibition catalogues, commissions, acquisitions, conservation and display: [www.henry-moore.org/grants](http://www.henry-moore.org/grants)

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## Idlewild Trust

The Idlewild Trust is concerned with the encouragement of the performing and fine arts, and the conservation of important works of art and objects. Under 'Arts Grants: Nurturing Young Professionals', they support programmes that improve opportunities for young professionals working creatively within the arts. Under 'Conservation Grants: Objects and Works of Art', they support the conservation of important objects and works of art in museums, galleries, places of workshop, historic buildings or their grounds. Objects include artefacts, textiles, furniture, metalwork, manuscripts, wall paintings, tombs and stained glass: [www.idlewildtrust.org.uk](http://www.idlewildtrust.org.uk)

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## Iran Heritage Foundation

The Iran Heritage Foundation is a non-political UK registered charity with the mission to promote and preserve the history, languages and cultures of Iran and the Persianate world. The objectives of the Foundation are achieved by organising and supporting activities of cultural or scholarly merit. IHF programmes include sponsoring teaching posts and fellowships at universities and museums, giving grants for academic research and cultural activities, and organising regular events and conferences, both in the United Kingdom and abroad: [www.iranheritage.org](http://www.iranheritage.org)

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## Japan Foundation

The Japan Foundation provides funding for Japan-related exhibitions through their Exhibition Support Programme. This is designed to give financial assistance to organisers mounting exhibitions or introducing Japanese art and culture to the UK: [www.jpff.org.uk/artsandculture/funding.php#visualarts](http://www.jpff.org.uk/artsandculture/funding.php#visualarts)

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## Jerwood Foundation

The Jerwood Charitable Foundation is a UK registered charity dedicated to imaginative and responsible revenue funding of the arts, supporting artists to develop and grow at important stages in their careers. It works with artists across art forms, from dance and theatre to literature, music and the visual arts. However, it does not currently encourage unsolicited applications: [www.jerwoodfoundation.org/project/27/jerwood-charitable-foundation](http://www.jerwoodfoundation.org/project/27/jerwood-charitable-foundation)

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## Kathy Callow Trust

Administered by the Museums Association, the Kathy Callow Trust makes awards to small museums for the purposes of assisting with the costs of conservation projects, including exhibition preparation, improving stored collections or running workshops for people "working" with museums: [www.museumsassociation.org/funding/kathy-callow-trust](http://www.museumsassociation.org/funding/kathy-callow-trust)

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## Leche Trust

The Leche Trust awards grants in the following areas: historic buildings of the Georgian period or earlier; church furnishings of the Georgian period or earlier; conservation of historic collections in museums and other institutions; professional performance in theatre, music and dance. The trust does not normally fund exhibitions, education or audience development activities: [www.lechetrust.org](http://www.lechetrust.org)

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## The MacRobert Trust

This Scottish based trust makes grants to arts and heritage organisations that fulfil their interests in 'Children and Youth' and 'Science, Engineering and Technology'. A breakdown of their interests under these themes are available to view on their website. Organisations are not required to be based in Scotland, but this is their main area of benefit: [www.themacroberttrust.org.uk](http://www.themacroberttrust.org.uk)

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## Mercers' Company Charitable Foundation

The Charity makes grants and donations for the benefit of a wide range of charitable purposes including welfare, education, the arts, heritage and religion. In the heritage category, they support the conservation of works of art and artefacts: [www.mercers.co.uk/charitable-trusts](http://www.mercers.co.uk/charitable-trusts)

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## Paul Hamlyn Foundation

Through their 'Arts access and participation' funding strand, the foundation wishes to support organisations that have ambitious plans to widen access to and deepen participation in the arts. It is not enough to just increase numbers; their emphasis is on addressing inequalities of opportunity. Their 'Arts-based Learning Fund' relates to projects which work with schools to deliver sustainable arts-based activities. [www.phf.org.uk](http://www.phf.org.uk)

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## Paul Mellon Centre

The Paul Mellon Centre for Studies in British Art is an educational charity set up to promote original research into the history of British art and architecture. They specifically refer to funding for research towards an exhibition or installation: [www.paul-mellon-centre.ac.uk](http://www.paul-mellon-centre.ac.uk)

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## Pilgrim Trust

The Trust's aim is to preserve and promote Britain's historical and intellectual assets and to provide assistance to vulnerable members of society. They fund both the conservation of collections and greater access to them: [www.thepilgrimtrust.org.uk](http://www.thepilgrimtrust.org.uk)

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## The Sackler Trust

The Trust's stated aim is to support the 'advancement of the public in the UK and elsewhere in the fields of art, science and medical research'. It appears to prefer to support larger institutions. Relevant areas of focus include supporting projects that: help widen access to the visual and performing arts; preserve heritage sites and important cultural icons now and for future generations; and improve access to education for the disadvantaged. [www.sacklertrust.org](http://www.sacklertrust.org)

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## Sasakawa Foundation

The Foundation's aim is to develop good relations between the United Kingdom and Japan by advancing the education of the people of both nations in each other's culture, society and achievements. It seeks to promote mutual understanding and cooperation through financial support for activities in the following fields: arts and culture, humanities and social issues, Japanese language, medicine and health, science, technology and environment, sport, and youth and education: [www.gbsf.org.uk](http://www.gbsf.org.uk)

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## Terra Foundation for American Art

The Terra Foundation supports and initiates historical American art exhibitions and academic programmes throughout the world, through grant opportunities for institutions. Funding is for projects that explore art (circa 1500-1980) of what is now the geographic United States. The Foundation recognises the value of fostering global perspectives to expand and enhance, and thereby strengthen, the understanding of historical American art: [www.terraamericanart.org/what-we-offer/grant-fellowship-opportunities/grant-opportunities-for-institutions/](http://www.terraamericanart.org/what-we-offer/grant-fellowship-opportunities/grant-opportunities-for-institutions/)

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## Wellcome Trust

The Wellcome Trust offers a wide variety of funding schemes to support individual researchers, teams, resources, seed ideas and places. The public engagement funding strand has two relevant schemes: People Awards and Society Awards. In these categories, projects must engage audiences with biomedical science or the history of medicine. Project activities can include exhibitions, workshops, events, outreach, films, websites and performance: [www.wellcome.ac.uk/Funding/index.htm](http://www.wellcome.ac.uk/Funding/index.htm)

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## The Wolfson Foundation

The Wolfson Foundation supports excellence in the sector, defined in this context both through the significance of the collections themselves and also through the work of the institution in displaying, interpreting and encouraging access to these collections. Grants are made for capital infrastructure projects, refurbishing or creating new galleries, and, less often, education and learning spaces. Non-capital expenditure, such as exhibitions, is excluded: [www.wolfson.org.uk/funding/arts-and-humanities/museums-galleries/](http://www.wolfson.org.uk/funding/arts-and-humanities/museums-galleries/)

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## Funders specific to Wales

### Ashley Family Foundation

Formerly the Laura Ashley Foundation, this organisation supports textiles projects, the arts, and projects which strengthen rural communities in Wales, especially mid Wales. [www.ashleyfamilyfoundation.org.uk](http://www.ashleyfamilyfoundation.org.uk)

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### Community Foundation in Wales

This community foundation includes heritage and culture in their list of interests. They manage a range of different grant programmes all under the one umbrella organisation: [www.cfiw.org.uk](http://www.cfiw.org.uk)

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### The Millennium Stadium Charitable Trust

This trust aims to promote education, history, language and culture particularly for those who face disadvantage and for those who live and work in Wales: [www.millenniumstadiumtrust.org.uk](http://www.millenniumstadiumtrust.org.uk)

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### Toyota Manufacturing UK Charitable Trust

This trust supports children, young people, education, health and the environment in Deeside, North Wales, and Burnaston, Derbyshire. [www.toyotauk.com/the-toyota-charitable-trust](http://www.toyotauk.com/the-toyota-charitable-trust)

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### Dezna Robins Jones Charitable Foundation

Funder of educational charitable causes which benefit the local South Wales community.

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## Funders specific to Scotland

### The Barcapel Foundation

A supporter of the built, literary and artistic heritage:  
[www.barcapelfoundation.org](http://www.barcapelfoundation.org)

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### The Craignish Trust

Funder of the arts, heritage, culture, science and the environment. Based in Edinburgh, they particularly like projects that are innovative or involve the community.

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### The Dunard Fund 2016

This is a newly registered SCIO - Scottish Charitable Incorporated Organisation, previously called The Dunard Fund. Because it is new there are no accounts available on Companies House or the charity's OSCR record. We have assumed that the grant-making strategy will remain largely the same. Previously it did not accept unsolicited applications, but it is worth listing because it is a strong funder of the visual arts at an international standard.

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### The Holywood Trust

The Holywood Trust provides grants to organisations working with and providing opportunities for young people in Dumfries and Galloway. This includes 'programmes for activities for young people' and 'cultural venues or arts programmes':  
[www.hollywood-trust.org.uk](http://www.hollywood-trust.org.uk)

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### Hope Scott Trust

The Hope Scott Trust promotes music and the visual arts in Scotland. Preference will be given to applicants who are Scottish by birth, or live permanently in Scotland. The Trust allocates a proportion of its resources to help musicians, artists, sculptors etc., with grants for commissions and musical events, and on the art side, to help with exhibitions, travel etc: <https://www.murraybeith.co.uk/services/trusts/hope-scott-trust.html>

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### The Hugh Fraser Foundation

This foundation makes donations to arts organisations as well as hospitals, schools, universities and charities working with the disadvantaged.

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### The Nancie Massey Charitable Trust

Their list of interests includes heritage, the arts, education, children and young adults, with a particular interest in projects based in Edinburgh or Leith. Grants are usually up to £2,000, though larger donations may be made.

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### The Ronald Miller Foundation

This Glasgow based trust supports a wide range of charitable activities including the arts and education. Most grants range from £500 to £2,000.

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### The Shetland Charitable Trust

Only applicable to Shetland based activity, this trust supports the arts as well as 'senior citizens, support grants and social assistance grants'.  
[www.shetlandcharitabletrust.co.uk](http://www.shetlandcharitabletrust.co.uk)

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### The Weir Charitable Trust

This trust supports projects run by Scottish-based groups in several categories including under 'Culture' the support of heritage (tangible or otherwise) of Scotland, through projects that encourage participation in and preservation of Scotland's distinctive culture:  
[www.weircharitabletrust.com](http://www.weircharitabletrust.com)

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## Funders specific to Northern Ireland

### The Esme Mitchell Trust

This Belfast based charity supports heritage, arts and culture in Northern Ireland. Although they have no website, their guidelines are available direct from the trust on request.

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### The Ultach Trust

Funder of a wide range of Irish language activities:  
[www.ultach.org](http://www.ultach.org)

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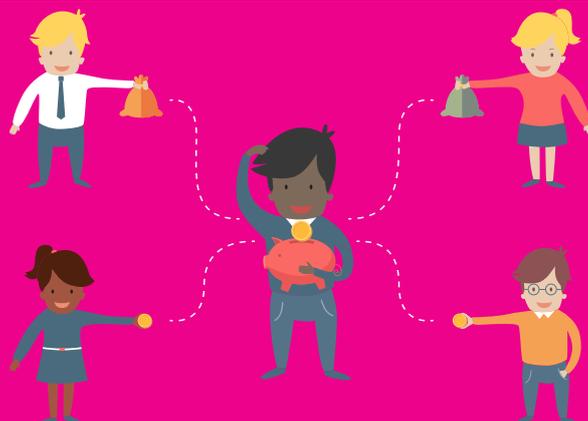
## 4 FUNDING: CROWDFUNDING

Museums, galleries and heritage organisations are increasingly recognising the potential of crowdfunding to engage with communities locally and nationally, to realise exhibitions and other projects, through public donations. A key example is Art Happens, Art Fund's free to use crowdfunding platform. Museums and galleries can run their own campaign on the platform with the support and advice of the Art Fund team; projects are also promoted to Art Fund's audiences: <https://www.artfund.org/get-involved/art-happens>

In 2018 Nesta (a UK Innovation Foundation) published their research on the pilot project they ran to explore the potential of matched crowdfunding as an innovative way of funding arts and heritage projects. The programme was run in collaboration with Crowdfunder and the matching grant funders were the Heritage Lottery Fund and Arts Council England. To read their main findings visit: [www.nesta.org.uk/project/arts-and-heritage-matched-crowdfunding-pilot/](http://www.nesta.org.uk/project/arts-and-heritage-matched-crowdfunding-pilot/)

Organisations also work with established crowdfunding websites such as Crowdfunder, Kickstarter, Indiegogo, Causevox, FundRazr, GoGetFunding (UK-based), and StartSomeGood to manage the fundraising. This approach to fundraising needs to be supported by a robust **marketing and communications** plan, focused on soliciting support through social media channels. Crowdfunding can effectively support fundraising for small amounts – up to £15,000 – for specific, discrete projects, or may be appropriate as an element of a larger fundraising initiative for a capital project or exhibition. Beware of the work commitment involved in crowdfunding – if a project is to be successful, it may require a considerable amount of time.

The Big Give, a charity search engine and secure way for donors to give online, provides another mechanism through which philanthropists can support charities, such as museums. The organisation runs programmes which help charities raise further income whilst enabling donors to increase the impact of their donations: [www.thebiggive.org.uk](http://www.thebiggive.org.uk)



## 5 FUNDING: WORKING IN EUROPE

### Brexit

At the time of writing the details of when and how the United Kingdom will leave the EU are being debated. If a deal is agreed, this will be followed by a transition period lasting until 31 December 2020.

In the event of a 'No Deal Brexit' UK organisations would no longer receive future funding for projects under EU programmes such as Creative Europe, Horizon 2020, European Social Fund, European Regional Development Fund and Erasmus+. However, if you have successfully bid into EU-funded programmes before the end of 2020, the Government has made a guarantee that you will receive funding and continue to receive it over the project's lifetime.

If your organisation is in receipt of the European funds, or you have submitted a bid to one of the European-funded programmes, you will need to register your projects to be eligible under the UK's government's guarantee: [www.gov.uk/government/publications/eu-direct-bid-funds-uk-recipient-registration-instructions](http://www.gov.uk/government/publications/eu-direct-bid-funds-uk-recipient-registration-instructions)

For more information and research to help arts and cultural organisations prepare for the UK exit from the European Union read the advice from the Arts Council and the Government's guidance for Brexit preparedness: [www.artscouncil.org.uk/advice-and-guidance/brexit-information](http://www.artscouncil.org.uk/advice-and-guidance/brexit-information) or <https://euexit.campaign.gov.uk/>

### Creative Europe

Creative Europe is the European Union's programme to support the cultural, creative and audio-visual sectors. From 2014 to 2020, €1.46 billion has been available to support European projects with the potential to travel, reach new audiences and encourage skill sharing and development. Creative Europe brings together a Culture sub-programme, which provides funding for the cultural and creative sectors, and a MEDIA sub-programme, which invests in film, television, new media and games. The Culture sub-programme supports the cultural and creative sectors and funds mainly collaborative projects across all art forms, such as visual arts, dance, theatre,

literature, performance, music, heritage, architecture, design, circus, festivals, craft and fashion. Examples of funded projects can be found on the [Creative Europe Desk UK](http://www.creativeeuropeuk.eu) website.

In the event of a deal between the UK and EU, UK organisations can continue to apply for EU programme funding until December 2020, including the forthcoming Creative Europe MEDIA and Culture sub-programme calls. UK organisations will have exactly the same rights and obligations as other countries participating in the Creative Europe programme until the end of the current programme. Successful Creative Europe applicants from the UK can receive funding until the end of their projects (even if they run beyond 2020). Please see above for guidance in the event of a 'No Deal Brexit'.

### Creative Europe Desk UK

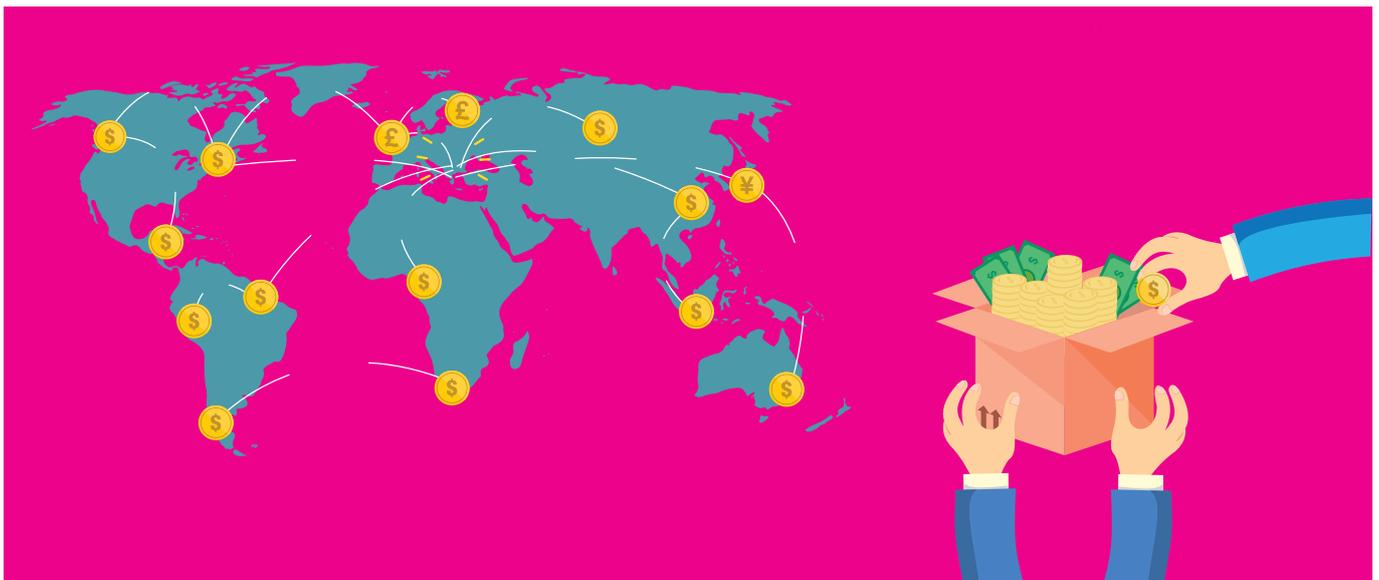
Promotes awareness and understanding of Creative Europe, and provides free advice and support for applicants from the UK. Creative Europe Desk UK's team of specialists are based across the UK (in London, Manchester, Edinburgh, Glasgow, Cardiff and Belfast) and they organise workshops, seminars and industry events. For more information go to the website: <http://www.creativeeuropeuk.eu>



## 6 FUNDING: WORKING BEYOND EUROPE

Working in partnership with UK or international organisations can enable cost-sharing and might open more doors to funding opportunities as financial support is sometimes only available to individuals and organisations from or working with particular countries. It is also worth contacting international embassies and British Embassies overseas, who in addition to offering support and contacts may also consider offering financial support. <https://www.gov.uk/government/publications/foreign-embassies-in-the-uk> or <https://www.gov.uk/world/organisations>

**Sponsorship** may be found to cover some costs, but in most cases the fee charged to the international venue hiring the exhibition covers all of the costs and any profit, depending on the level of the fee applied.



# 7 SPONSORSHIP

**Corporate sponsorship is a business deal between two or more parties, in which one of the parties meets all or part of the costs of - in this case - an exhibition and/or associated activities in exchange for commercial advantages.**

## Sponsorship

**Sponsorship can provide the following benefits:**

- A cash injection can help to enhance the quality of the exhibition
- A cash injection can help to increase the length of the tour
- The organisation may wish to become affiliated with a sponsor in order to maximise kudos and publicity
- A sponsor's name or brand can help add significance to an exhibition and/or tour
- A company may be able to provide necessary but costly equipment, thereby freeing up some of the budget and allowing for expenditure in other areas

**The essential ingredients of a sponsorship deal are that each party:**

- Must be able to see the exchange of benefits. Remember that this is a two-way partnership. Both parties should come out of a sponsorship deal feeling that it has been worth it
- Has a good working relationship with the other party from the outset, and takes steps to maintain it throughout the project. Bear in mind that the original plan may have to be revised, and that compromises may be necessary at some stage
- Delivers their part of the sponsorship deal

## Finding sponsors

Sponsorship covers a number of ways in which a company can become involved with a charity or public body. There are different types of sponsorship and different levels of commitment. The four main areas are corporate philanthropy, corporate social responsibility, cause-related marketing and, finally, commercial sponsorship. The reasons why companies sponsor vary: corporate philanthropy is more personal and can be related to an individual's interest, whereas commercial sponsorship tends to be more impersonal and relates to commercial gain. Companies also sponsor to improve customer awareness and attitude: they may feel the need to demonstrate a certain caring, concerned, or environmentally-conscious approach to their marketing.

**When researching potential sponsors, it is always a good idea to look at the following factors:**

- The location of a company (head office or branches), in relation to the exhibition tour. They may have a marketing strategy which targets certain areas around the country and perhaps the project will help this remit
- Company profile. Check newspapers, and keep abreast of what is going on around you; it is possible that a company has had recent press coverage. Sometimes companies sponsor because they need good publicity to counteract negativity, and the time may just be right for your project
- What are the sponsors trying to sell? Does the exhibition relate in some way to their marketing objectives?

National sponsors are more likely to have a greater level of sponsorship money available to that of a regional or local company. For example, a local branch of a national bank will have a limit on what they can spend on sponsorship whereas the national set up will have a bigger marketing/sponsorship budget available.

Finding sponsors can be a time-consuming activity and the 'needle in a haystack' approach is best avoided. Look for synergy between your exhibition and the businesses around you and your venues. Find out about your charity's personal and organisational links to businesses in the area by talking to your trustees, your patrons, staff, volunteers and other keen supporters. As with all other areas of fundraising, a personal connection or interest will make a big difference; find out who knows who and consider making your initial approach through that relationship.

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### **Sponsorship etiquette**

Supply the sponsor with information about each of the venues. The sponsor may be particularly interested in an association with a specific venue or its location, in terms of their marketing strategy.

Make sure that the sponsor's brand is visible on publicity materials, during the exhibition and especially at previews and other events. The sponsor will normally supply branding material, and it is crucial that visitors see and receive this information.

Look after the sponsor, not only because of all the hard work to get them on board in the first place, but also because they may be useful contacts in the future.

Be gracious to their guests, and give them a personal guided tour of the exhibition. You never know to whom you may be talking, and they may also become useful contacts in the future.

Reward your main point of contact at the sponsoring company, with special attention and a formal 'thank you' for their help, and show your appreciation in other ways.

Supply documentary evidence - press releases, photographs and press coverage - of the success of the exhibition and/or tour. Don't make the sponsor work for this information: they may need it to justify the spending and will appreciate any support.

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### **Working with venues**

As with all other aspects of a tour, it is essential that lines of communication are clear for the duration of the project. The existence of a third party, the sponsor, puts an extra responsibility on the organiser and venues alike to maintain good contacts.

The organiser should ensure that venues are aware beforehand of the sponsors which are to be approached. This is important as there may be a conflict of interests. Venues should supply details of any contractual commitments that they need the organiser to follow, before the latter makes any commitments to any deals with a sponsor. Sponsors may want their logo in a prime position on all publicity materials, a requirement which may not be acceptable for some venues.

Check with the sponsor before venues embark on additional sponsorship deals. The sponsor may insist on sole rights, or there may be a conflict of interests. If there is no conflict of interest and the organiser or a venue wants to bring other partners on board, then it can be proposed that the original sponsor's logo becomes more prominent or that additional sponsors are credited without a logo.

The organiser and venues should try to develop their audience and mailing list by using the sponsor's own contacts. Offer to mail out invitations on behalf of the sponsor. Although some sponsors may prefer to organise this in-house, to maintain client confidentiality, it is still polite to ask. Alternatively, ask for a copy of the sponsor's RSVP list and collect their guests' data on arrival at each of the private views.

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# SUSTAINABLE TOURING

**Edited by:**

Nadine Loach, Sustainable Exhibitions for Museums

Alice Lobb, Touring Exhibitions Group

Produced in  
collaboration with:

**SUSTAINABLE  
EXHIBITIONS  
FOR  
MUSEUMS**

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# 1 WHAT DO WE MEAN BY SUSTAINABLE EXHIBITIONS?

**Sustainability plays a key part in many museums' organisation-wide strategies. Museums increasingly see the importance of managing their past, present and future through sustainable concepts and practices. This approach is vital to the success of the museum and its exhibitions.**

When we think of a temporary exhibition, we think of a display that is available for a finite amount of time; an experience that is fleeting, something that is part of the appeal, and is therefore in essence unsustainable. However, exhibitions can be sustainable. Sustainable exhibitions are those that take into consideration environmental, financial, cultural and social sustainability before, during and after their production.

- **Environmental.** Recycling and re-using objects, monitoring energy use and keeping it to a minimum, and using environmentally-friendly materials.
- **Financial.** Sustainable exhibitions are in the most part low-cost as they are focused on low-impact production. However, they may not necessarily be immediately low-cost but they will save money in the long run. Financial sustainability also means ensuring that your touring exhibition is beneficial to the economy, particularly locally.

- **Cultural.** The heritage and integrity of the collection and loan/s to the exhibition must be maintained. The reputation of the establishment must be sustained, with the exhibition being of educational and historical significance.
- **Social.** The exhibition should hold social value locally, nationally and internationally (where relevant). The exhibition is shown to be sustainable through community relationships and staff contribution.

Many of us are already thinking along the right lines; we want to change things but may not have the time or job description to allow for this. It is key to remember that making touring exhibitions more sustainable is a behavioural change. If you have the right mindset from the beginning, then you will quickly see sustainable improvements in every aspect of your exhibitions programme.

## 2 THE RELATIONSHIP BETWEEN TOURING AND SUSTAINABILITY

The relationship between cost saving and sustainability is clear. Below are some key areas where sustainability is a consideration for touring exhibitions and some examples of good practice.

### Transport

There are significant cost savings to be made if transport is taken into account as part of sustainable exhibitions planning. By consolidating object collection and dispersals, working with other organisations to team up, and sharing transportation, just a few simple steps can lead to big savings. Ensuring you have a good relationship with your transport agent is paramount to a mutual understanding of your aims and to make savings where possible.

#### Case Study 1: Natural History Museum

*“We hired in the ‘Mammoths’ touring exhibition from the Field Museum of Natural History in Chicago. The National Museum of Scotland hired the exhibition before us so we worked with them to share the cost of shipping, which meant a transfer by road from Scotland. When it came to sending back the additional specimens that we loaned from the National Museum of Scotland, we stored them until we were able to put them on a truck with some other loans going to Scotland. This way we saved on petrol and transport.”*

- Overall shipping costs Chicago-Edinburgh-London-Chicago were split between venues including the host venue.
- Shipping costs for additional objects Edinburgh-London were split between the two venues.
- Overall shipping costs for NHM were halved, saving approximately £70,000.

#### Other benefits:

- Reduced staff time as each venue could pick up the others’ work where possible.
- Environmental savings from having two UK venues instead of just one.
- Shared resources - e.g. NHM interpretation and editorial departments changed text from American to English, then shared with Edinburgh, which saved time. NHM also managed the tender and printing costs for the new graphics and shared the costs with Edinburgh.

#### Case Study 2: Wellcome Collection

*“We have designed a small plug-in-and-play pop up touring exhibition unit showing content from the Wellcome Collection’s ‘Thinking with the Body’ exhibition. Commissioned films are housed and displayed within a wheeled flight case for ease of set up and transportation. The unit is managed by Studio Wayne McGregor and tours with their show ‘Atomos’. It is set up in theatre foyers for audiences to interact with. It has travelled to several destinations in the UK and Europe and is still on tour.”*

*Luke Currall, Senior Project Manager*

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### Case Study 3: Manchester Art Gallery

*“We have worked with other organisations in Manchester to combine transport - one example that springs to mind is a joint exhibition we held with the Whitworth in 2012 - the exhibition was split over both our sites, but we appointed a joint agent to transport loans to both venues. The Whitworth have also collected items on our behalf when they’ve been to London in their van, and we have tried to work together with them to combine transport for exhibitions.”*

Phillippa Milner, Senior Galleries Registrar

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### Case Study 4: National Galleries Scotland

*“Our location really required us to consolidate loan collections/dispersals - almost all of the overseas loans will come/go through London. We would work with the transport agents to organise London collections for instance and then possible collections en route to Edinburgh and another collection for ‘local’ collections or in and around Scotland. We would also look at how collections from overseas can be combined or consolidated on the way.”*

Louise Rowlands, Registrar

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## Crates and packing

Crates can be rented which reduces costs and materials. Otherwise if a custom-made crate is necessary, a sustainable option is to refit an existing crate. Packing materials including polythene and brown tape are available as recycled and recyclable material. It is also worth re-using packing material where possible. The important thing is to make sure it is unpacked and stored correctly. It is also important to take accurate packing notes to save time and materials when repacking, and as part of your duty of care to the loans.

### Top tips from John Bracken, Co-Director, Patina Art Collection Care Ltd

If loans are travelling in the UK in a well-made crate, do they need to be wrapped at all?

No polythene = no barrier = least possible movement and rubbing.

- 250 gauge polythene is less green as it is thicker but it does mean that it is reusable.

- Use reusable cotton tape instead of masking tape to wrap delicate frames.
  - For acid free tissue paper try Preservation Equipment Limited for a low cost yet good quality version.
  - Instead of using thick brown vinyl tape, biodegradable versions are available that peel off better.
  - Using tabs at the ends makes it easier to remove, meaning that you are less likely to use scissors during unpacking, and are therefore less likely to damage packaging so that it can be reused.
  - Jiffy is reusable; bubble wrap is not. You can take the tape off jiffy corners and reuse again and again at only £40 per roll.
  - Consider using double-ended transit frames or multi-slotted cases. These take up less space and use less materials, saving on costs during transport and production.
- 

### Case Study 2: Rijksmuseum

*“We have our own plastic boxes and cushions to pack small objects, which are re-usable. They are easy to store and last for a long time. This also counts for our suitcases in which our objects from the print room travel. Just a suitcase for more objects, easy to use and no need to make new ones every time something travels.”*

Wobke Hooites, Registrar

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## Object framing, mounts and supports

Object mounts and supports often need to be custom-made. If this is the case, then recycled and recyclable material can be used that is long-lasting. It is important to care for them correctly to ensure that they are sustainable in both design and durability. Another option is to use standard size frames that can then be used for future loans if storage is available.

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### Case Study 1: Wellcome Collection

*“Smaller and more regularly used picture frames are currently stored in our conservation exhibitions store. Nearly all framing and mounting is carried out on site where possible.”*

Luke Currall, Senior Projects Manager

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## Case Study 2: Victoria and Albert Museum mannequin review

***“We went into the project with three main aims: to get a handle on what we had in stock; to devise a method of keeping track of stock and disposing of unwanted stock; and to improve our procurement practices.***

***“The main things we wanted to achieve within this were:***

- ***reduce the amount of bespoke mannequins being kept***
- ***use more of the space for mannequins which are very adaptable - the idea of ‘keep fewer, use more’***
- ***reduce the number of overlaps in purchasing i.e. buying things we already had in stock but couldn’t find***
- ***improve the safety and accessibility of the mannequin store***
- ***promote sharing between departments***
- ***help staff think about what was and wasn’t worth keeping***
- ***devise a Mannequin Framework in line with EU directives on procurement***

***The project was an overwhelming success and I’m very proud that we achieved everything we set out to, and more.”***

*Keira Miller, Senior Conservation Display Specialist*

### Benefits

- Mannequins tour with exhibitions, saving venues thousands of pounds in mounting costs. This also reduces the amount of time needed to install the exhibition at venues and the risk to objects.
- In the first six months (July-December 2014), £10,000 worth of mannequins were re-used (i.e. to buy new mannequins would have cost £10,000)
- Exhibitions mannequins were re-used for include ‘Savage Beauty’, ‘Disobedient Objects’ and ‘The Fabric of India’.
- Also used for gallery rotations, museums events, visual merchandising, and Learning and Interpretation events.

- The store saves the museum on average between £10,000 and £20,000 per annum by re-using the mannequins and having a clearer method of storage and usage.

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## Exhibition build and equipment hire

Planning the design of your exhibition with sustainability in mind means that you can keep costs, energy and waste down. If your build is reusable and made from recycled and recyclable material then this will benefit you greatly. It is also important to take stock of local producers and equipment hire so that you are working with the local community, benefiting the local economy and producing a more sustainable exhibition build. If your build is easily demountable then it is worth discussing whether you can transfer the whole or parts of the build. Aim to produce a sustainable, durable build and make sure you look after it correctly so that it lasts as long as possible and is of the best quality visually and structurally.

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### Case Study 1: Manchester Art Gallery

***“We are currently installing ‘Matthew Darbyshire: An Exhibition for Modern Living’ and have managed to do the majority of the build (mainly plinths) reusing timber and MDF from the construction from the previous show. We had lots of perspex and timber vitrines made for an exhibition last year and have kept all of these and reused them in another show this year.”***

*Catriona Morgan, Principal Operations Manager*

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### Case Study 2: Patina Art Collection Care Ltd

***“If you have a choice, go with plywood and then line it if you need to. When you start making holes in MDF it looks terrible and it is harder to repair than plywood. If you do a new build always remember to seal the back with a varnish/paint/mist coat otherwise when you work on the front side this will cause swelling and cracks.”***

*John Bracken, Co-Director*

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### Case Study 3: Wellcome Collection

*“Knowing who we are working with at the beginning of a project means that we can design the exhibition taking into account the two gallery spaces so that display cases, structures and furniture can be reused, designed to travel and adjustability can be factored in.”*

Luke Currall, Senior Projects Manager

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## Display cases

Cases can be extremely expensive to produce and difficult to store depending on the storage space available at your organisation. It often appears easier to dispose of them and produce new ones as and when the designs for exhibitions arise. However, another option is to plan your exhibitions programme to take into account the stock of cases that you have available. You can also work with the other tour venues to share the costs of producing display cases and arrange for them to be transferred as part of the exhibition. You might also want to consider adapting cases to make them fit for purpose. Alternatively, you can offer cases to other museums who may then be able to offer you the same in future.

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### Case Study 1: Wellcome Collection

*“We build many of our new display cases to be as robust and adaptable as possible, to GIS guidelines and with adjustable feet, security fitted hoods, resprayable metal legs, hidden recesses for climate control opportunities and the possibility to change internal fabric covered bases. [...] We are developing our ‘Skeletons: Buried Bones’ exhibition with regional partners and the skeletons will be displayed at the host venues reusing the same cases from the original show. We have also lent the cases to the Museum of London for their show ‘Doctors, Dissection and Resurrection Men’.”*

Luke Currall, Senior Projects Manager

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### Case Study 2: Museum Freecycle

*“If you are in the process of dismantling your exhibition or updating your displays, spare a thought for your museum colleagues and, rather than throwing your unwanted items out, consider offering them via Museum Freecycle. The site was founded a year ago by Caroline Keppel-Palmer, former Managing Director of an architecture firm who saw how much exhibition kit was being skipped due to lack of space.”*

Caroline Keppel-Palmer, Founder

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## Design and Interpretation

Design and interpretation can be produced that is transferable between venues for touring exhibitions. It is however worth considering whether it is more sustainable to do this and save on materials but use energy to transport, or if more of a saving will be found by sharing the text (and design where appropriate) and having each venue produce their own designs and interpretation locally or in-house.

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### Case Study 1: Wellcome Collection

*On touring exhibitions: “Supporting structure, furniture, text and graphic panels, captions, mounts, lightboxes and associated AV also travel.”*

Luke Currall, Senior Projects Manager

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## Lighting

Consider sustainable lighting options such as LED which can use 70% less energy and reduce energy bills by the same amount. Make sure the lighting is turned off overnight and whilst the exhibition space is not in use. It might also be possible to integrate renewable energy into your building or in your grounds. If you can cut down on the energy output for lighting, then this will add to the overall savings made on your exhibitions.

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### Case Study 1: Natural History Museum

*“We reuse 100 LED light panels every year for our ‘Wildlife Photographer of the Year’ exhibition. The photos are printed on to thin plastic sheets which then slot in front of the light panels. This means they are backlit so there is no need for track lighting. When the exhibition tours, the lightboxes go with it.”*

Beca Jones, Project Manager

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## Recycling, Waste and Storage

Despite the best intentions, temporary exhibitions can produce a lot of waste material. Much of this can be avoided by recycling and reusing materials. The main thing is to make sure you dispose of it correctly, so ensure you have a good relationship with your operations team and waste/recycling collector.

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### Case Study 1: Foundling Museum

*“We have hosted a Quentin Blake show that was at Compton Verney before us and one of our shows did go the States. However, with our exhibitions we do try and recycle and re-use as much as possible. [...] We often have temporary MDF and timber walls built for our shows and where possible we recycle this wood once it has been used. Often timber is taken by our next door neighbours - Coram (a children’s charity) and I have also used Recipro - a building recycling website – before to get someone to collect and re-use the MDF. We also try and store as much spare wood and MDF ourselves which can then be used to make plinths and shelves for the next exhibition. Storage is often an issue so it is dependent on this.”*

Chris Larner, Operations and Visitor Services Manager

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### Case Study 2: Wellcome Collection

*“Our external storage facilities in north London allow for safe storage of display cases, plinths, furniture, AV object mounts, prints, reproduction, props, blocks and large picture frames. Storage, its ease of access and management is often key to our sustainability options. We are currently in the process of moving over to the Mimsy exhibition management database where our stock of available and reusable exhibition items will be managed.”*

Luke Currall, Senior Projects Manager

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### 3 THE RELATIONSHIP BETWEEN FUNDING AND SUSTAINABILITY

**Sponsorship and funding applications frequently acknowledge and sometimes actively support sustainable working. Financial cuts in the sector mean it is essential to reassess our position, so we can produce touring exhibitions in a sustainable way that does not reduce the quality of the visitor experience.**

- Arts Council England require that those in receipt of funding have an environmental policy and action plan. They also ask that organisations collect data on emissions from energy and water use. This information must be submitted on an annual basis. Since implementing the requirements, ACE have seen substantial financial, reputational and team morale benefits in the organisations involved.
- Arts Council England's partnership with Julie's Bicycle supports major funded organisations in their environmental sustainability efforts. They provide IG Tools that allow organisations to measure their environmental impact through reporting. They have significant resources available on their website that organisations of all sizes and levels of funding can utilise. They can also help with developing or updating your environmental policy and action plan.
- The Mayor of London's Green Visual Arts Guide outlines the steps towards more sustainable exhibitions for visual arts organisations. The focus of the report for exhibitions is on reducing transport and improving the design and construction of displays. If you are in London, you can also sign up to the Mayor's Green Procurement Code which supports organisations committed to reducing their environmental impact.
- The AIM Sustainability Grant Scheme is intended to help museums improve their medium and long term sustainability.
- The Happy Museum Project looks at how UK museums can become more sustainable. They commission museum projects aimed at forming a 'community of practice'.
- The Sustainable Exhibitions for Museums (SEFM) network comprises museums professionals across the UK all working towards making exhibitions more sustainable. Through a cost benefit approach, SEFM provide advice and support to help museums produce more sustainable exhibitions. This includes resources on fundraising and the financial benefits of sustainability.
- The Green Tourism Award helps museums review their position and produce an action plan for improvement. The award can highlight great ways for museums to become more sustainable generally and in touring exhibitions, by reducing environmental impact and saving on related costs.
- RE:FIT is the Mayor of London's scheme to reduce carbon emissions in Greater London. The aim is to improve the energy performance of buildings in London, thereby reducing their CO2 footprint and achieving significant cost savings.
- The Museums Association have some useful resources on sustainable practice in museums and information about related funding.

# 4 SUSTAINABLE EXHIBITIONS CHECKLIST

Consider the following areas of activity to weigh up the most sustainable and economically advantageous approach before, during and after touring an exhibition.

## 1 Preparation

- Consider the different scenarios for your exhibition including partner venues, transport and design.
- Research is key at this stage to ensure that you work with the most sustainable businesses possible.
- Set out your aims for the exhibition from the outset. Whether it is touring in the same country or internationally, there are always ways to make the whole project more sustainable and have it fall in line with your aims. Consider your carbon footprint including lighting, staff time and environmental controls.
- Include sustainability conditions as part of tender documents. Talk directly with your contractors and suppliers about sustainable options.

## 2 Sustainable Budgeting

- There are several options to choose from. Planned correctly, sustainable touring walks hand in hand with careful budgeting. If your funds are limited, sustainability is your friend. If you know where you want to save money, then you can start from this.
- Alternately, if you have a surplus of resources and materials and some of these are shared with your touring partner/s then you can agree on how to save costs, energy and materials from the outset.
- You may even consider approaching a tour partner that you know has resources available to share, which may mean that energy and transport costs as well as risk are kept to a minimum.

- Take stock of the resources you have available to you: this could include materials, resources, energy, staff time and volunteers.

## 3 Loans transport

- Plan the transport carefully with your chosen agent. Always ensure that they have a solid environmental policy and that you work closely with them to reduce the number of collections and drop-offs so as to make the distance covered as efficient as possible.
- Crates and packaging - re-use or rent where possible.
- Think about the weight and volume of loans. Avoid air freight and opt for road transport where possible; always check whether it is possible to use sustainably-sourced bio-fuel. Also don't discount rail and sea freight.
- Make sure you work closely with other local museums so that you can collaborate on shipping if the opportunity should arise. This should be considered on a case by case basis.
- Consider touring exhibitions that make the most of your collection, should you have one. This is not only sustainable in that you already have your object on site, it also makes the most of the cultural and social value of your collection within your museum and your community. The line is then blurred between permanent and temporary exhibitions and you save on display, transport and packing costs.

## 4 Meetings and research trips

- You may be required to travel for meetings. If your exhibition is touring internationally, or requires research abroad, this can be tricky. The main thing is to consider whether each trip is absolutely necessary.
- Skype and conference calls are often easier and cheaper, and it is more environmentally sustainable to meet via digital comms rather than in person.

## 5 Couriers

- Keep couriering to a minimum.
- Not everything requires couriering and it is always worth negotiating with lenders. Often it becomes clear that the objects will be safe during transit and the exhibitions organiser/s will be on hand once they arrive to oversee offloading, unpacking and installation.
- However, there are cases where objects must be couriered if the objects are delicate, unstable or of financial or cultural significance. This is entirely acceptable but there are still ways to make the process more sustainable.
- Often lenders will allow other couriers to oversee their objects on their behalf so make sure you support this.
- The courier should be encouraged to use public transport to and from their accommodation and during the rest of their visit.

## 6 Exhibition design

- Design efficiently and use existing stock.
- Object mounts and supports must be well-suited to each object, but it is worth taking into consideration whether the materials are the most sustainable in terms of durability and adaptability.
- Consider sustainable lighting options such as LED.
- Have you discussed interpretation with your designer and other tour venues? You may find that you can share the costs of producing interpretation that can then be transferred between venues.
- Always plan your exhibition build with disassembly and/or reuse in mind.
- Where possible, design exhibitions with standard dimensions so that it is easier to reuse materials such as timber and plaster.

## 7 Environmental conditions

- This is a hot topic. Several museums have now opted to relax their environmental conditions, which has resulted in significant cost savings without jeopardising the collections/loans. This is a great way of making exhibitions more sustainable; the obstacle is that it must be agreed upon by all lenders. Passive environmental control is still worth considering as part of the planning of the exhibition and tour.

## 8 Installation

- Use lenders' fittings and return after use. Take your time and label each work, any fittings, and make sure everything is kept together.
- Reuse your fittings (e.g. mirror plates) where possible.
- Make accurate packing notes and keep packing material for repacking the loans. If you make sure it is correctly labelled, stored correctly in sealed reusable bags in a safe, dry and dust-free environment, there is no reason not to reuse it. Packing notes save on time and any misunderstandings. Consider digital condition reports which removes endless sheets of paper and printing.
- Make sure everyone on board during the installation and de-installation at all venues is aware of your recycling and waste policies. This will ensure that everything is disposed of correctly and efficiently.

## 9 Waste and Recycling

- Do you know how much waste you are producing for every exhibition? If you measure and identify it, you will be in a better position to find solutions to minimise it.
- Have you checked what you can and cannot recycle? Make sure you're in the know.

- Build partnerships with organisations and museums in the local area. Chris Lerner says 'We generally maintain good links with surrounding galleries. In the past we have borrowed carpet from Whitechapel Gallery. Often I find that if the timings work well, galleries and museums are keen to dispense of material for free if they are trying to get rid of it.'
- Museum Freecycle is a great network where organisations can post their unwanted items for collection by other museums. As well as the obvious environmental benefits, this is also great for creating sustainable relationships with other museums and means that if you are looking for a particular item (e.g. a display case) then you may just find what you need for free on the network.
- Explore other reuse options, for example The Brixton Remakery are always keen to have materials such as MDF and paint and will collect for free. There are other similar initiatives all over the UK.

## 10 Legacy

- What have you learnt from this exhibition in terms of sustainability?
- Can any of the materials go towards future exhibitions?
- Is there anything that you would do differently next time so as to make it more sustainable? Learn from your experiences and progress will be made in each exhibition.

# TOURING IN PARTNERSHIP

**Edited by:**

Charlotte Dew, Touring Exhibitions Group

Alice Lobb, Touring Exhibitions Group

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# PARTNERSHIP TOURING

## 1 Touring in partnership

Partnership is essential to touring exhibitions. Touring projects require venues to work together effectively, to transport and present exhibitions in multiple venues. At its most simple, a touring partnership will involve an organisation that has originated an exhibition, working with a hiring venue to present the show. More sustained partnerships can result in co-produced content and commissioning, and the division of roles and responsibilities to develop and tour the exhibition. Touring in partnership can enable venues to share costs and work, and access funding that would not otherwise be available.

The time and work required to maintain touring partnerships should be acknowledged to enable a touring programme to operate effectively.

The stage in the exhibition's development at which a partnership is brokered, will affect the nature of the partnership. The type of partnership that is most suitable for an organisation or project will depend on its aims and objectives, as well as the experience and capacity of those involved.

Partnership touring is recommended by 98% of those who have worked in partnership to tour<sup>1</sup>.

### Types of touring partner include:

- Museums, galleries and other cultural organisations
- National and regional bodies and organisations
- Individuals e.g. private collectors, artists
- Sponsors
- Funders
- Commercial companies e.g. galleries, service providers

### Approaches to partnership touring include:

**Lead venue partnership;** a lead venue manages a partnership between a number of organisations, sharing workload and costs in agreement, to develop an exhibition.

**Equal partnership;** a group of venues form a partnership and share costs and workload equally, to develop an exhibition.

**Strategic partnership;** a national or regional organisation works with a venue, or brings together a group of venues - through invitation, application or competition - to develop an exhibition, providing funding or/and project management, that realises their strategic objective e.g. access or audience development.

**Reactive partnership;** an organisation develops an exhibition on their own, another venue expresses an interest in hiring it and the exhibition is adapted to be shown at the other venue.

**Commercial partnership;** a venue or group of venues works with a commercial exhibition touring company to develop and/or promote and manage an exhibition to tour.

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<sup>1</sup> *Economics of Touring Exhibitions Survey Report: An Analysis of Touring Exhibitions Practice in the UK.* Charlotte Dew, TEG Researcher, April 2016. Available from [www.teg.org.uk](http://www.teg.org.uk).

## 2 Advantages of working in partnership to tour

### There are many benefits to working in partnership to develop and tour exhibitions:

- Shared workload; greater capacity
- Access to expertise
- Pre-arranged group of venues to tour to
- Sharing skills and knowledge
- Access to objects
- Access to funding e.g. Heritage Lottery Fund, Arts Council England Strategic Touring Fund
- Cost sharing
- Wider publicity/marketing
- Access to wider/different audiences
- Staff development
- Support for an expanded programme of activities
- Strengthening/building relationships with venues for future projects and tours
- Exhibitions that better meet audience and venue needs
- Development of more outward looking organisations, able to collaborate on projects beyond touring

## 3 Finding a suitable partner

Partners with a willingness and commitment to collaboration are at the heart of an effective partnership. Your touring partner might be someone you already know and work with, or a project might be a platform for establishing a new partnership.

In considering suitable partners, think about the synergies you need to have and the complementary skills and resources. You might connect with a partner because of a common subject interest, or because they have experience in a particular area of activity which they are willing to share.

Write a list of the qualities you are looking for in the partnership and use these as a reference when brokering opportunities. Consider the type of match you would like in advance.

Networking and a strong understanding of sector trends and activity will help you identify potential partners, and develop the confidence necessary to propose and broker a partnership. See the Economics of Touring Exhibitions Sector Awareness Resource for more information on becoming sector aware and the benefits.

## 4 Top tips for effective partnerships

- Allocate sufficient time and research to finding the right partner(s); ask whether you will be able to work effectively together
- Ensure you and your partner's aims, objectives and schedule are compatible
- Consider whether the partnership team has the range of skills and expertise it requires to deliver the project
- Establish clear and good communication practices; keep all the relevant collaborators well informed
- Agree and sign a partnership agreement or contract
- Make key decisions together, unless otherwise agreed, and delegate small tasks and decisions appropriately so progress is not tempered by too many bureaucratic procedures
- Agree and monitor a schedule and key milestones
- Arrange regular meetings, to suit the project; explore how the time and expense of meeting may be reduced by Skype or conference calling
- Clearly define the roles, responsibilities and tasks of those working within the partnership
- Address issues and problems as they arise; don't allow the problem to grow
- Identify and monitor potential risks



## ABOUT TEG

# ABOUT TEG

TEG is the national network for touring exhibitions. It is an independent membership organisation concerned with promoting and supporting touring exhibitions, on behalf of exhibition hirers and originators, as well as delivering research and training. Members include professionals from galleries, museums, libraries, art and science centres, as well as sector service providers.

The organisation is run by a volunteer committee drawn from museums and galleries across the UK, supported by a small secretariat. TEG is committed to supporting the exchange of exhibitions as a means of sharing ideas, materials and resources, in the belief that touring extends public awareness, knowledge and enjoyment of historical and contemporary culture.

# NOTES





[www.teg.org.uk](http://www.teg.org.uk)