

Guide to Principles of Engagement

Contemporary visual arts in heritage contexts

Introduction

This document sets out the principles of engagement for the presentation and commissioning of visual art in heritage contexts for both the heritage and arts sectors. It assumes some, little or no knowledge of this area of practice and is aimed at both the arts and heritage sectors.

The National Trust and English Heritage, supported by Arts Council England Area North commissioned Arts&Heritage to deliver a series of seminars in Manchester, York and Newcastle in 2013 for arts organisations who had experience of, or who were interested in, working with the heritage sector. In addition, Arts&Heritage undertook research into examples of this area of practice, developing a number of online case studies. The Audience Agency undertook audience analysis and mapping.

Audiences

There are two broad approaches that could be taken, based around attracting current or new audiences:

- A focus on visual arts that is high quality, and linked to recognisable tradition/orientation-points and fits with the historical environment of sites. This would appeal to Traditional Culture Vultures, Mature Explorers, Dinner and a Show and Retired Arts and Crafts.
- A focus on contemporary, more experimental work using newer art forms and techniques, e.g. video and performance art. This would attract the Urban Arts Eclectic and may also appeal to Fun, Fashion and Friends. The relationship between this approach and existing visitors would require careful management.

The most appropriate approach will vary by site and their specific circumstances, but may well involve a compromise between these two extremes. It is worth noting, however, that engaging contemporary art audiences [especially Urban Arts Eclectic] may help with increasing the ethnic diversity of heritage site visitors.

Tailoring A Visual Arts Offer To Families

The following artistic differences may be suggested:

- Explorer Families – more similar to an adult art offer, but with educational elements; opportunities for a creatively more innovative offer if seen to be relevant
- Home and Family – a more conventional artistic offer, strongly linked to other areas of interest [e.g. general history], but with opportunities for social elements and activities for the children
- Kids First Families – a focus on low-cost, active and child-focused art, with an emphasis on excitement and enjoyment.

There is a range of resources to enable engagement of family audiences with the arts, including a family friendly toolkit, available on CultureHive <http://culturehive.co.uk/resources/family-friendly-toolkit>

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Key Recommendations

Strategy and planning – There are great benefits to be had by introducing contemporary art into heritage contexts, but it is important to realise that the primary drivers of each organisation will be different and that each will have its own planning cycles. Allow plenty of time to establish the basics before going ahead with a project. Identifying the right person in the organisation to approach is likely to result in a more informed conversation.

Initial meeting – Ideally this should include the property manager and the Artistic Director [or CEO] of the arts organisation. You will require ‘buy in’ from the top from the start. At this initial meeting both parties need to be clear about the intent, aims and objectives of running a contemporary arts project and to share their own anticipated outcomes.

You could also consider using the case studies available on the Arts&Heritage site:

<https://www.artsandheritage.org.uk/projects/>

Project Proposal – Following the initial meeting, make sure that a draft project proposal is written that articulates aims, objectives and agreed anticipated outcomes – e.g. visitor experience; increased engagement with site; increase in secondary income; new members recruited; opportunity for artist(s) to make new work and engage with new audiences. Share and refine this between you. Agree who will draft the marketing strategy and who will take a lead on different aspects of the project.

Budget – Establish a budget, which includes all cash and in-kind contributions, and takes into account artist and curators’ fees, travel/accommodation expenses; installation/de-installation costs; maintenance of artworks; marketing and promotion including social media; launch; events and artist talks; training of staff and volunteers; documentation; signage; orientation leaflet and an amount for contingencies. Identify the shortfall, if there is one, and potential sources of additional funding and write a fundraising strategy.

Project Management – There needs to be clear lines of responsibility so it is important to identify one person who will manage the whole process. In some cases, a dedicated project manager on a short-term contract may be necessary, who works alongside the curator and other stakeholders. Create a small steering group, which meets regularly to update on the development of the project and agree forward plans.

Artistic guidance/curation – It is useful to have someone who acts as curator – this may be one of your team who has experience in this area or you may need to contract someone with the right expertise. A curator should either lead on, or assist in drafting the brief for the artist(s), draw up the methodology for selection, invite or target particular artists for a specific context or act as a panel member along with site staff to select artist proposals.

Visitor experience – Thought needs to be given as to how an audience might engage with the work in this context. Bear in mind that visitors to a heritage site are not always familiar with contemporary arts practice – there needs to be a ‘way in’ for the heritage visitor to engage with the art. Customary practice is to have a room guide or outdoor guide. Think of other ways to ensure that the visitor understands this is a temporary art intervention, and is able to find information easily about the artwork and the artist.

Staff and volunteers – To ensure the project has the support of the people who will meet the public, it is important to take time to explain the rationale of the project and to introduce staff and volunteers to the artists. Volunteers can become powerful ambassadors of a project and can help in writing engagement information as well as developing other initiatives for visitors. The key message is to involve them as early in the project as is possible.

How to find the appropriate artist(s) – If your partnership doesn’t include an experienced arts organisation with the expertise and knowledge of how to find an artist, there are organisations and agencies that can assist you (listed at the end of this document).

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The following outlines methodologies that could be adopted for selecting an artist:

- Contract a curator to assist in developing the artistic vision of the project and help select artists.
- Advertise the opportunity through known online arts networks – e.g. Artsjobs, a-n, Axisweb opportunities, Artsadmin's e-digest, ArtQuest, and local arts organisations' mailing lists. Bear in mind that an open call for artists could result in many applications.
- Trawl through databases of artists and artworks – Arts Council Collection, Axisweb with the assistance of an arts expert/curator.
- Target a particular artist(s).

Artists' proposals – It is usual once artists have been shortlisted, to offer a small proposal fee for them to work up an idea for the project. The panel will then be able to make a more informed decision about which artist(s) to select.

Installation and challenges – It is likely that artworks will not be able to touch or alter the fabric of the historic building, or penetrate historic grounds beyond a certain level. Installation should be discussed at an early stage of the project development and any particular issues identified in the artist's brief. Within their proposals, artists should indicate how their work would be installed, and both sectors should be aware of installation costs. Usually the artist is offered a fee that includes installation, but sometimes installation costs are identified outside of the 'research, design and making' of the work. For temporary projects, heritage sites must always be returned to their original state without alteration and disturbance.

Resourcing – It is important to identify all resources and responsibilities at an early stage. This can assist in identifying where and if there is a cash shortfall, or even a lack of expertise to develop the project. It is likely that your partnership contains different governance models, which can sometimes assist in identifying sources of additional funds.

For example:

- Some trusts and foundations will only accept applications from an organisation with charitable status
- An Arts Council England funded arts organisation, known as a National Portfolio Organisation (NPO), is unable to apply for the Arts Council England's Project Grants programme
- There are sources of funds that will only support specific elements of a project – for example engaging young people, disadvantaged communities
- The Heritage Lottery Fund doesn't usually fund arts projects, however they may consider some aspect of your project
- Don't forget local trusts that may have small budgets but like to support activity in their local community
- Local sponsorship/ corporate social responsibility. Remember that an advert in the local paper can be expensive – consider offering a special deal for local businesses/corporate clients in return for cash support
- Crowdfunding

When you are drawing up the scope of your project, you need to take into account which partner will take a lead on fundraising. Writing a fundraising strategy at the start of the project will reveal the timescales needed to deliver the project.

Evaluation – Evaluation is key to demonstrating a project's success or where it needs improving. You need to set benchmarks at the beginning that relate to your aims – this could include numbers of visitors, increase in membership, increase in secondary spend or dwell time. However qualitative feedback is also important – have visitors enjoyed their visit more as a result of the project?

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Evaluation should start at the beginning of any project and be included in all aspects. Usual tools for feedback are visitor surveys, feedback forms both in print and online. Also important is the feedback from artists who have been commissioned and the members of staff that have been involved.

Don't forget to take good documentary photographs of the works, both in-situ and with audience engagement. These are really valuable to use as promotional tools, and they can also help demonstrate the project's success and impact for the development of any future events. If documentation captures any visitors, permission will need to be granted for that image to be used publicly so always ensure you have permission forms to-hand for people to sign (if they give permission).

Arts Council England's website has a useful tool for evaluation: <http://www.artscouncil.org.uk/selfevaluation/>

Proving the Case for future projects – Visitor numbers, any uplift in secondary spend, bookings by education groups, press and marketing coverage can all be included within the evaluation. Be mindful also that the 'x factor' of organisational change and how the site/history has been revealed/promoted differently should be acknowledged. It is not just visitor numbers and income that is important; have visitors had a more enjoyable experience at the heritage site as a result of any contemporary art intervention?

Key points checklist

For heritage organisations

- Set aside enough time to develop the project, including research
- Be aware of language / terminology differences between the sectors
- Develop the artist's brief together with art organisation / curator you may be working with
- Identify conservation issues at an early stage; these need to be included in the artists' brief
- Identify representatives from your organisation that should become part of a steering group
- Consider working with a professional arts organisation or curator
- Identify the person within your organisation who will lead on the project
- Identify locations on site to prioritise and include these in the artists' brief
- Identify clear objectives for the project and what the organisation needs to achieve
- Develop the rationale for a business case - meet and discuss this with arts partner
- Organise some 'go and see' projects as part of the research phase or look at case studies
- Keep site staff and volunteers informed of the project
- Ask the curator / arts organisation to brief volunteers / site staff at an early stage
- Be aware that the lead person will need to set aside time for management of the project
- Set aside budget for the proposal stage
- Decide whether you need to contract a project manager
- Discuss with curator / arts organisation the best way to find artist for your project
- Set aside funds for marketing
- Don't forget that press and profile coverage is important
- Document the project - you will need good images for further fundraising
- Consider engagement / dedicated talks / special curator / artist evenings.

For arts organisations

- Set aside enough time to develop the project, including research
- Be aware of language / terminology differences between the sectors
- Discuss expectations right from the very start of the project
- Be aware that most arts projects / programmes developed by heritage organisations need to relate to their business plans
- Let the heritage organisation lead and takes 'ownership' of the project
- Be aware that most heritage locations / situations will be strict on conservation and installation issues – ask about these before developing a firm idea
- Develop the artist's brief together with the heritage organisation you are working with
- Explain which approach may be appropriate for finding artists
- Think about how the location / site will be restored to its original state
- Consider maintenance issues when you are developing the project idea / proposal
- Agree on clear expectations with heritage organisation at an early stage

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- Be aware that budgets for arts projects may be tied in to annual cycles and procedures
- Discuss whether the heritage organisation needs a dedicated contracted project manager
- Keep the organisation informed and be aware that decision making may take time
- Identify key staff within the heritage organisation to help with information sharing and support. Work out site visit arrangements and include staff and volunteers
- Discuss marketing and press / PR issues at an early stage and agree key design concepts
- Discuss potential talks / engagement / events ideas at an early stage
- Site staff / volunteers are key – set aside time to work with them or give talks.

Roles and responsibilities - project development checklist

The project management role is to:

- Manage the overall project and keep it within timescale and budget
- Draft the risk assessment and ensure it is shared with all stakeholders
- Work with the curator to identify the nature of each commission
- Liaise with curator and artist(s) to ensure that work meets original specification
- Co-ordinate all transport of works
- Oversee installation – liaise with grounds staff / site manager / property manager
- Be responsible for all planning issues / operational plan
- Manage external contractors
- Be responsible for project documentation/technical specification
- Ensure deadlines / key milestones are met
- Work with site for interpretation / visitor flow / project plan.

The curatorial role is to:

- Research and develop project idea in partnership with commissioner / host
- Research / identify artists who could be approached and contact them / galleries / agents
- Assist in drafting the artist's brief
- Steer artists responding to the brief, including being present at site visits
- Manage the artists' proposal stage
- Provide ongoing liaison with artists' galleries and commissioner
- Act as liaison between commissioner / host and project manager
- Advise on visual identity of project / brand and assist in drafting interpretative text.

Artist costs – if commissioning new work

- Site visits - including accommodation / travel
- Proposal fee
- Fee for design and realisation of work
- Installation costs [if not accounted for elsewhere in the budget]

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- Fee for overseeing the installation / press interviews / talks.

Artist costs – if hiring / borrowing work

- Hire fees for existing works – depends on ownership of work
- Fee for overseeing the installation / press interviews / talks.

Installation / technical

- Technical specialist expertise if needed for installation
- Transportation costs - to site and back
- Maintenance of commission / digital implications
- Preparation of grounds / site preparation and staffing time
- De-installation and making good of site
- Health and safety.

Marketing

- Consider employing a specialist press / PR agency
- Brand development
- Online presence – website / social networking via Facebook / Twitter
- E-flyers – use every available mailing list and focus on different parts of the project
- Leaflets / catalogue
- Signage on site
- Posters / banners
- Postcards of work for sale at venue
- Launch – VIPs / members / staff and volunteers
- Invite press for a preview – develop press packs.

Documentation

- Photography of works in-situ
- Short film of the project / interviews with artists and visitors for future fundraising / profile raising / evaluation
- Permission forms.

Launch - [VIPs and members / artists and contacts / staff and volunteers]

- Associated costs – it is useful to have the artists and curator present
- Invitations – are these to be sent by email or post?
- Refreshments
- Extra staff / invigilation required, especially if outside normal opening hours.

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Education/outreach

- Offer free travel for groups
- Education project / co-ordinator / artists fees for special project
- Curatorial / artist fees for talks.

Evaluation

- Visitor surveys – online and at site
- Contract in specialist agency for visitor profiling / collating data.

Useful Contacts

- Arts&Heritage <http://www.artsandheritage.org.uk>
- Arts Council England <http://www.artscouncil.org.uk>
- The Audience Agency <http://www.theaudienceagency.org>
- Axisweb <http://www.axisweb.org>
- a-n <http://www.a-n.co.uk>
- ArtsJobs <http://www.artsjobs.org.uk>
- Artquest <https://www.artquest.org.uk/opportunities/>
- Artsadmin <https://www.artsadmin.co.uk/for-artists/edigest/>