



MUSEUM
ACCREDITATION

Supporting Guidance for
Accreditation Standard
November 2024

Accreditation: How to meet the Standard

November 2024

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Welcome to the Accreditation Scheme

Thank you for your interest in Museum Accreditation, the UK Standard for museums and galleries.

The Scheme sets out nationally agreed standards of good practice for the sector. It is managed as a partnership between Arts Council England, the Welsh Government, Museums Galleries Scotland and the Northern Ireland Museums Council.

What are the aims and requirements?

We want museums to be resilient, focused and trusted organisations that offer their visitors a great experience.

The Accreditation Standard is a handbook for running a successful museum, ensuring participants have essential policies, plans and procedures in place. The requirements cover three broad areas of museum activity: organisational health; collections; and users and their experiences.

The Scheme safeguards long-term access to public collections and provides a framework for ethical museum practice. It links directly with Spectrum - the UK collections management standard, and the Museums Association Code of Ethics.

Once Accredited, participants need to maintain the requirements of the Standard. The Scheme best supports organisational development when a virtuous circle of consultation, planning, review, improvements, and evaluation is in place.

By participating in the Accreditation Scheme, you will need to agree to our **Terms and Conditions**.

What are the benefits?

Gaining Accreditation is an endorsement. It's the mark of a professionally run museum and an achievement to be proud of. It provides reassurance to funders, lenders, donors and other stakeholders that a museum has a solid foundation.

Accreditation helps with advocacy, particularly within larger organisations like local authorities, universities or professional bodies where museum activity is not the primary purpose of the organisation.

It also helps with accountability, providing reassurance to Board members in their oversight role.

The Scheme enables museums to assess their current performance, as well as supporting them to develop their services. There is an emphasis on forward planning for a successful and sustainable future.

For applicants and participants, the Accreditation assessment process represents a useful external check.

Who can apply?

Museum Accreditation is a flexible and inclusive Standard. It's used by all types of public museums - from small volunteer run organisations to national institutions. We tailor the requirements according to museum size and type. You can find out more about these criteria in the Accreditation Guidance: **Museum Scalability Indicators** document.

We award Accreditation to individual museum venues (a physical site/space/building), rather than collections.

The application process

The Accreditation Scheme has a two-stage application process. We first ask applicants to complete an Eligibility Questionnaire. If your museum meets key eligibility criteria, you'll gain Working Towards Accreditation status. You'll then have up to three years to prepare and submit an Accreditation application.

If your application demonstrates that you meet the requirements of the Standard then we will award Full Accreditation. Once Accredited, museums must keep us informed if they experience any change which impacts on their ability to meet the Standard. This is included in our **Terms and Conditions**.

Your Accreditation award lasts until your next review. This usually takes place every five years and is based on an assessment of your Accreditation Return.

You can find guidance, resources and templates to support you through each step of the process in the **Accreditation Guidance Library**.

The UK Accreditation Partnership

Assessments are undertaken by the UK Accreditation Partnership: Arts Council England, Museums Galleries Scotland, the Welsh Government and Northern Ireland Museums Council.

Each organisation is a national development agency for museums. As part of the Accreditation assessment, we'll consider how museums work within their nation's context, political priorities and legal framework:

England

Arts Council England is the national development agency for museums in England. The Investment Principles within our **Let's Create** strategy provide a framework for museum development. They are Ambition and Quality; Inclusivity and Relevance; Environmental Responsibility and Dynamism. Arts Council England runs a range of national schemes to support museums, including the Museum Development Programme which delivers Accreditation advice and ongoing development support to museums at a local level.

Scotland

Museums Galleries Scotland provide museum development support and Accreditation assessment for the museums in Scotland. There is an expectation that museums will deliver against the **Scotland's Museums and Galleries Strategy** and Scottish Government priorities, e.g. Fair Work.

Wales

Accreditation assessment and museum development support in Wales is provided directly by the Welsh Government through officers in the Culture Division. The direct role of the Welsh Government in providing museum development support means there is an expectation that non-national museums will deliver against the **Programme for Government** and other policy priorities. This is seen explicitly, for example, where recipients of grant funding are expected to demonstrate how they support policy commitments.

Northern Ireland

Northern Ireland Museums Council supports and develops local museums through Accreditation; Grant in Aid; Training and Skills Development; Research; Networking events; Guidance and professional support; Advocacy; Programming and partnerships.

How to use this guidance document

The Accreditation Standard requirements cover three broad areas of activity:

- Requirements 1-3 – Organisational Health
- Requirements 4-6 – Managing Collections
- Requirements 7-9 – Users and their Experiences

This document explains how to demonstrate that your museum is meeting each of the requirements. It details the evidence you'll need to submit and why it's important. Some evidence applies to all museums; other evidence is tailored according to museum size and type.

How to decide your museum size and type

Museums that participate in Accreditation vary a great deal in size and governance type. Accreditation is one standard with one set of requirements covering the UK museum sector; but it is not one size fits all. The appropriate responses for museums of different sizes and types are indicated throughout this guidance.

To select your museum size and type, compare your museum against the indicators outlined in the Accreditation: **Museum Scalability Indicators** document.

Then in the guidance below, you can skip directly to the notes specific to your museum as appropriate.

Evidencing approval of policies and plans

In some cases, we'll need to see evidence of approval of policies and plans from your governing body, or the relevant delegated sub-committee. This will need to be signed by the authorised individual, for example your Chair or a Cabinet member.

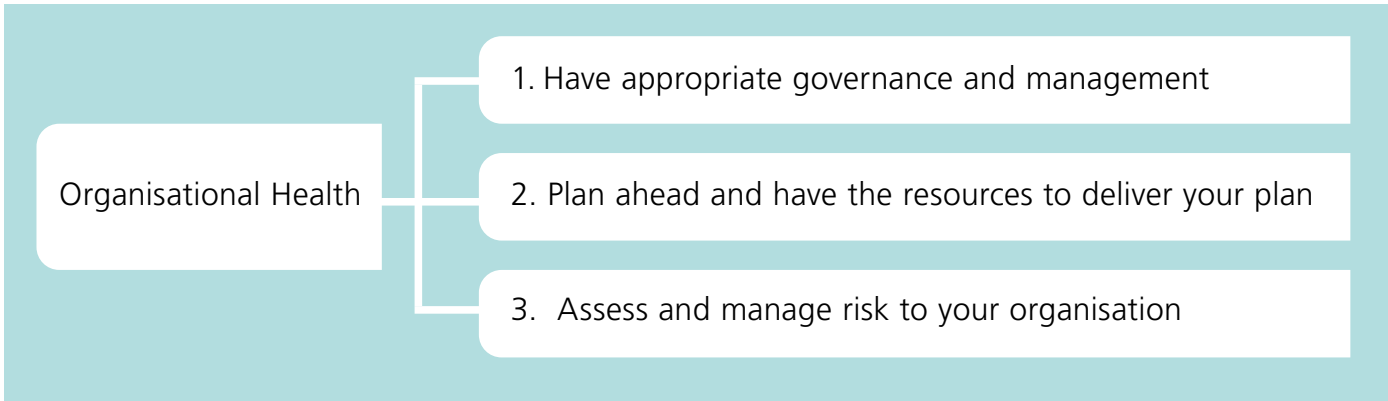
The evidence of approval may take several forms depending on your organisation. It can be: a signed copy of a full or redacted set of minutes; or a signed copy of an extract from the minutes that includes date of the meeting, item number and full discussion of that item, minus any redactions; a signed statement from the appropriate individual which states that the plan, policy etc has been approved by the governing body.

By 'signed' we mean: a photocopy or scan of a paper document showing the actual signature from the appropriate individual; an email from the appropriate individual with unsigned minutes attached that states that those minutes, redacted minutes, or extract from the minutes were approved on a particular date; an email from the appropriate individual.

For local authorities we can accept a published (internet) decision document which might not actually be signed. In this case publication is evidence of approval.

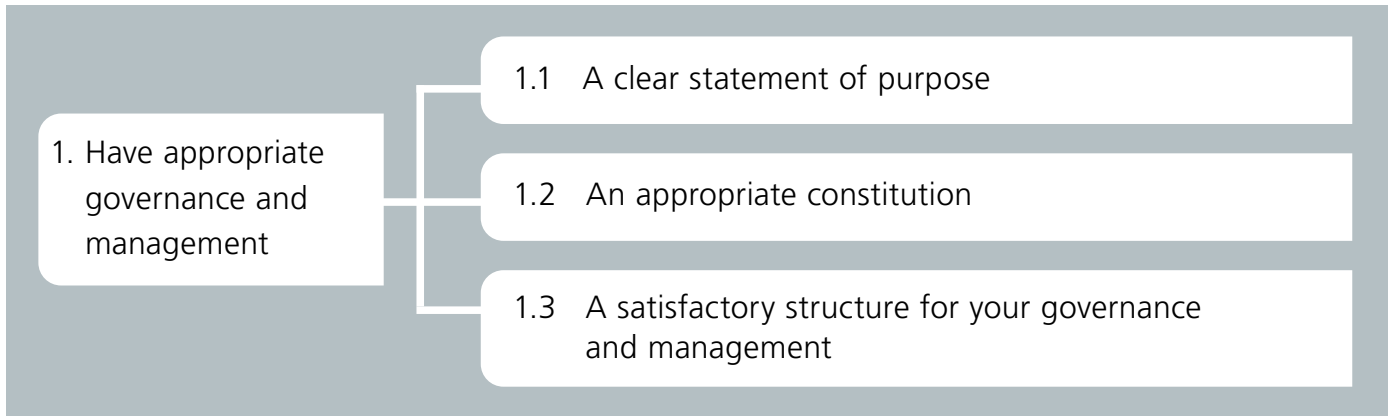
Guidance for Accreditation Standard requirements 1-3, Organisational Health

The first three requirements of the Accreditation Standard look at how you run your museum, your governance and management. You'll need to provide evidence of how you plan ahead, how you ensure you have the resources to run the museum and deliver the forward plan, and how you assess and manage risk in your organisation.



1. Have appropriate governance and management

To meet the Standard, you'll need to provide evidence that you have each of the following:



1.1 A clear statement of purpose

All museums		
To meet the Standard, you'll need:	Why is this important?	What evidence is needed?
1.1 A clear statement of purpose	<p>The statement of purpose defines why the museum exists and who it's for. It underpins decision making, activities, policies and promotion.</p> <p>It should be communicated and understood throughout your organisation and by your stakeholders and users.</p>	<p>This is typically located in your governing document. It should appear in key policy and planning documents.</p> <p>You'll need to tell us where the statement of purpose is within your key documents - governing document, forward or business plan and collections development policy.</p>

Independent museums – types 1-3

Charities and Charitable Incorporated Organisations are guided by a constitution which will include their statement of purpose (known as the 'object' or 'objects'). This may have been written some time ago and may have been re-written in more up-to-date language as a 'mission statement' for use in policy and planning documents.

Where the charitable object/statement of purpose has been re-written, the meaning should not be changed.

Local authority museums – types 1-3

There may be several different statements of purpose at different levels within the local authority – from a wider Council statement to the individual museum's statement. Where this is the case, please provide copies of all the relevant documents. There will typically be:

- An overarching Council statement of purpose guiding the cultural strategy (or equivalent)
- A statement of purpose drawn from the cultural strategy (or equivalent) guiding the museum service planning document
- A statement of purpose for the individual museum supporting the museum service's over-arching statement of purpose

University and Higher Education museums – types 1-3

The statement of purpose will typically be located within the relevant committee terms of reference or the terms of an endowment or bequest.

National museums

National museums are typically governed by an Act of Parliament or Royal Charter and constituted as charities guided by a constitution which will include their statement of purpose (known as the 'object' or 'objects').

Nationally-styled museums

This will relate to your appropriate governance type as Nationally-styled is a marketing approach rather than a governance type.

What we're looking for, requirement 1.1 checklist:

- that the statement of purpose is clearly carried through from your governing document to key plans and policy documents, such as the forward/business plan and the collections development policy
- where a shortened statement of purpose has been developed from a more complex or overarching statement, we'll look to see that the meaning has been retained
- if the statement of purpose is supported by a more detailed statement or mission, we'll look to see the core purpose has been maintained

1.2 An appropriate constitution

All museums		
To meet the Standard, you'll need:	Why is this important?	What evidence is needed?
<p>1.2 An appropriate constitution</p>	<p>Museums are long-term organisations that exist to benefit the public and protect their assets including collections. Constitutions are important. They are legal documents which set out the organisation's intentions towards long-term public benefit and protection for collections.</p> <p>Your governing document must enable you to do this.</p>	<p>This refers to your governing document. This is a legal document that sets out an organisation's aims and, usually, how it is administered.</p> <p>We'll need to see this document(s). You'll need to provide us with a copy of the latest approved version.</p> <p>Your museum's current governing documents need to cover the following constitutional criteria:</p> <ol style="list-style-type: none"> 1. Exists for public benefit 2. Can demonstrate its collections and assets are appropriately protected 3. Has powers to operate a museum and hold collections and assets, these powers must be transparent and should not include the ability to distribute assets or profit for private gain 4. Is subject to statutory regulation or judicial process in relation to its conduct 5. Must be a permanent entity with a long-term purpose.

Independent museums – types 1-3

Charities and CIOs are governed by a constitution. This is your governing document – a legal document that sets out an organisation's aims and, usually, how it is administered.

The constitution should give the power to hold and/or own a collection and to operate a museum within either its primary objectives or a subordinate clause. If you're a registered/recognised charity, you'll also have to be registered with the relevant regulatory authority (Charity Commission, Office of the Scottish Regulator).

You'll need to provide a copy of your governing document.

Where registration isn't possible, the museum should evidence **charitable recognition from HM Revenue and Customs (HMRC)**.

Local authority museums – types 1-3

Local authorities are deemed to have the power to operate museums through the relevant Act of Parliament or Order (Northern Ireland):

- England & Wales: Public Libraries and Museums Act 1964; Local Government Act 1972
- Scotland: Public Libraries Consolidation (Scotland) Act 1887
- Northern Ireland: The Museums and Galleries (Northern Ireland) Order 1998

Local Authority Museums may be the Principal Authority or a Town, Community (Wales) or Parish Council where authority has been delegated. Local authorities may also have powers to operate museums through an appropriate Local Authority Act.

Whether your governance arrangements are directly managed or contracted, you'll need to attach your museum's current governing documents. This might be given as a copy of the museum's constitution, or reference to the relevant Act of Parliament, Order, or Local Authority Act.

In some cases, museums may be charitably constituted, and the local authority acts as its sole trustee. In this case we would need to see the legal agreement with the local authority which empowers the charitable trust to run the museum.

So that we can understand any contracted arrangements, you'll need to provide copies of any agreements between the local authority and the managing organisation. This might include documents such as a management or service level agreement, or a collections loan agreement.

University and Higher Education museums – types 1-3

Universities and other Higher Education organisation are deemed to have the power to operate museums where eligibility criteria are met. The governing document will typically be located within the relevant committee terms of reference or the terms of an endowment or bequest. You'll need to provide a copy of your governing document.

National museums

National museums are typically governed by an Act of Parliament or Royal Charter and constituted as charities guided by a constitution which will include their statement of purpose, known as the 'object' or 'objects'.

The regulatory body may be the Parliament from which the Act originated, whether UK Parliament or devolved, rather than the Charities Commission or the Office of the Scottish Charity Regulator (OSCR).

You'll need to provide a copy of your governing document.

Nationally-styled museums

You'll need to provide a copy of your governing document. This will relate to your appropriate governance type.

What we're looking for, requirement 1.2 checklist:

- that the governing document is the latest approved version
- the information provided matches the information held by the relevant regulatory body – for example the Charity Commission
- whether the name of your organisation is consistent with that of the governing body
- whether there are any linked or subsidiary organisations – for example a collections holding trust
- that the governing arrangements are clear
- that the museum's constitution has the powers to operate a museum
- that there are opportunities for public access and engagement with the collections
- that the museum constitution gives the powers to hold assets and a collection
- whether the assets and collections are protected and used for public benefit
- that the museum has a long-term purpose
- a governing body constituted under your governing documents

1.3 A satisfactory structure for your governance and management

All museums		
To meet the Standard, you'll need:	Why is this important?	What evidence is needed?
<p>1.3 A satisfactory structure for your governance and management</p>	<p>There needs to be a management structure in place with appropriate authorities, roles and responsibilities to allow formal decision making and accountability.</p> <p>Your museum needs an appropriate and competent workforce to run it effectively and must have employment policies, plans, and procedures in place as a legal requirement.</p> <p>Effective staffing policies underpin a positive and inclusive workforce culture.</p> <p>Regular training and development are essential to ensure that the workforce is confident and competent and keeping up to date with current practice.</p> <p>Having effective succession plans for trustee and workforce renewal and systems in place supports the transfer of knowledge and helps maintain an appropriately sized and diverse workforce.</p>	<p>You'll need to describe your management arrangements.</p> <p>You'll need to confirm who has the authority to approve museum policies and plans. You will need to evidence this.</p> <p>If a separate organisation runs the museum, we'll need to see any approved agreements between that organisation and the governing body.</p> <p>You'll need to tell us how you access advice from museum professionals for policy development and decision making.</p> <p>If you have an Accreditation Mentor you'll need to provide the signed mentor agreement, a signed minute confirming the appointment and a mentor report.</p> <p>You'll need to confirm arrangements you have in place for recruitment, induction, identifying training needs, training, learning and development and succession planning.</p> <p>You'll need to provide a copy of your organisation or workforce chart.</p> <p>You'll need to provide a copy of your written volunteer agreement or equivalent document outlining specific roles and responsibilities.</p>

We want to see appropriate levels of staffing and expertise for your museum and that there's a clear line of communication between the museum professional and your governing body. The level of advice in place should be appropriate to the size and scope of your museum. For smaller museums, without paid professional staff, this requirement can be met by appointing and acting on the input of a Trustee with museum professional experience or an Accreditation Mentor.

A museum professional is defined within Accreditation as having:

- At least three years' experience of working in museums as an employee, at curatorial/ managerial level. This experience can be across any of the three areas within the Standard: organisational health, managing collections, or users and their experiences
- A commitment to personal learning and development to show how they're keeping their knowledge, skills and experience up to date

We expect the Accreditation Mentor to attend at least one meeting of the governing body a year and visit the museum at least once a year. We'll ask for an Accreditation Mentor report to accompany your application or return. This can be uploaded to the online form or provided separately to the Accreditation assessing organisation.

Independent museums – types 1-3

Where the governing body has set up a managing committee to manage the museum, or the museum is managed by a legally separate organisation, we'll need to see clear and agreed terms of reference and responsibility from the governing body.

The expectation for type 1 independent museums is that they are operated entirely, or mostly, by volunteers; usually supported by an Accreditation Mentor. There is also likely to be a mixture of paid and volunteer staff for type 2 so an Accreditation Mentor may also be appropriate. For a type 3 the expectation is that the museum would employ at least one paid museum professional. We'll look to see how your governing body engages with your Accreditation Mentor, for example by receiving invitations to meetings and minutes of meetings and by visiting on site at least once a year.

Local authority museums – types 1-3

The line of authority will depend on whether a cabinet or council model is in operation. We'll look at how the line of authority and approvals link from the governing body (Council) to the museum. This will usually be covered within the Council's terms of reference and its delegation scheme.

A paid museum professional must be employed at the museum. Where a service manages a number of sites, it's not expected that each individual museum has its own dedicated staff team so long as all have access to museum professional staff and this is appropriate to the size and scale of the museum service.

University and Higher Education museums – types 1-3

The overall governing body will typically be the Council or Senate and we'll look for a clear line of authority from the governing body to the museum. There may have a specific managing committee, in these cases we'll look to see that delegated authority is in place for approvals.

Where the museum is managed by teaching staff as part of their role the expectation is that their responsibilities to the museum will be included within their job description.

National museums

Nationally-styled museums

This will relate to your appropriate governance type.

You'll need to confirm that you employ multiple museum professionals, covering a range of activities.

You'll need to tell us what staffing arrangements are in place to support research at your museum.

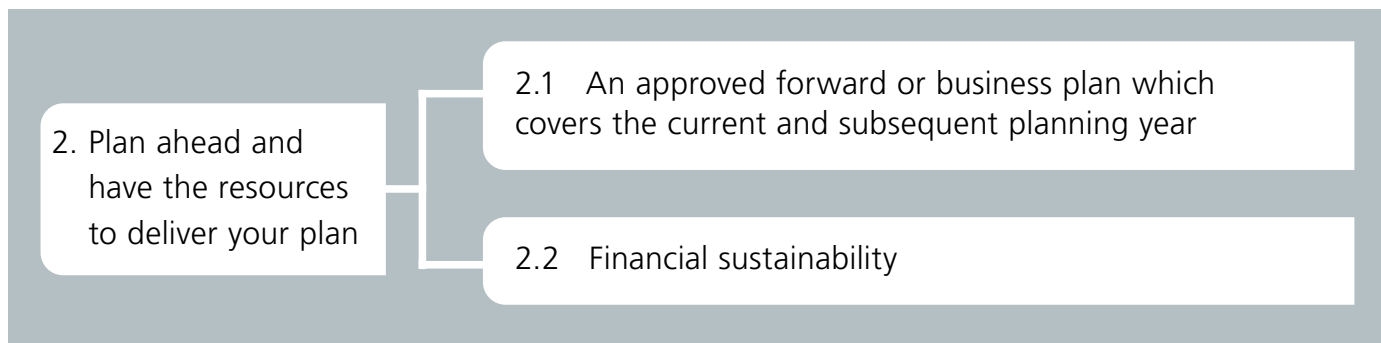
You'll need to explain how your professional staff provide expert advice to other museums, galleries and collections. This could be through Accreditation mentoring but there's a range of other ways to demonstrate how you deliver sector support, for example through leadership or participation in Subject Specialist Networks.

What we're looking for, requirement 1.3 checklist:

- evidence of delegated authority with approved terms of reference for all managing committees and sub-committees
- who, or which group, has the authority and responsibility for approving policy documents. This might include decisions you delegate to sub-committees, staff or volunteers
- if a legally separate managing organisation manages the museum, we'll ask to see your formal agreement, for example a Service Level Agreement. This needs to show who is responsible for what functions and who pays for what, as well as where any monies generated are directed. Who has ownership of the collection, as well as ownership of recently collected items, must be clear
- that your governing body has access to museum professional advice for policy making, appropriate to your size and type
- your core organisational structure is appropriate to the size and scale of your museum
- whether there are sufficient roles in your workforce to deliver your responsibilities and your forward/business plan effectively, appropriate to your size and type
- the number of frozen/vacant posts and to understand what plans you have to re-appoint or mitigate the effect of these vacancies
- appropriate strategies and procedures being in place for recruitment, induction, identifying training needs, training, learning and development and succession planning including knowledge transfer for your governing body, paid staff and volunteers
- evidence of formal appointment of an Accreditation Mentor if needed
- If applicable, we'll ask for an Accreditation Mentor report to accompany your application or return

2. Plan ahead and have the resources to deliver your plan

To meet the Standard, you'll need to provide evidence that you have each of the following:



2.1 An approved forward or business plan which covers the current and subsequent planning year

All museums		
To meet the Standard, you'll need:	Why is this important?	What evidence is needed?
2.1 An approved forward or business plan which covers the current and subsequent planning year	<p>Museums should plan effectively for the long-term and be able to adapt to changes in the sector and society.</p> <p>Your forward or business plan sets out the key aims and objectives for your organisation and how they will be delivered over a specific time and to a specific budget.</p> <p>Key aims are the building blocks of your plan. A good set of key aims will cover financial sustainability, collections management, audience development and access and environmental sustainability.</p>	<p>Forward or business plans come in all shapes and formats. Your plan should be appropriate to the context and size of the museum. It should outline the ambitions for the sustainable development of the museum.</p> <p>We ask to see the museum's plan so that we can understand how your organisation plans for the future.</p> <p>We don't expect you to produce a plan purely for Accreditation purposes but to have a plan for your business needs. This plan will be useful in guiding the development of your museum.</p>

All museums		
To meet the Standard, you'll need:	Why is this important?	What evidence is needed?
<p>2.1 An approved forward or business plan which covers the current and subsequent planning year</p>		<p>Your forward/business plan should include:</p> <ul style="list-style-type: none"> • Statement of purpose • The period the plan covers • The key aims you want to achieve • The objectives in this planning cycle to achieve the key aims • The resources needed to achieve these objectives, including people, timescales and money • Budgets for the current and subsequent planning year • A review date <p>Within the plan, consider alignment with wider developmental activity in your UK nation context.</p> <p>You'll need to provide a copy of your forward/business plan. You'll also need to submit signed approval from your governing body or delegated authority for the statement of purpose and key aims. It's likely that your specific objectives and budgets may change within a year or two, so we don't need these elements to be formally approved.</p>

Independent museums – types 1-3

Smaller organisations will be expected to provide shorter forward or business plans compared to those provided by much larger institutions, but the elements described above should be in place. We'll expect to see the plan has been informed by consultation.

Local authority museums – types 1-3

Within local authority structures, multiple plans and planning cycles may exist. It's typical for a cultural strategy or similar to provide the context for planning.

If you have a broader service or division plan, we'd need to see individual site plans or be able to distinguish your activity within any larger plans. We'll want to see all levels of the plan, along with appropriate approvals, as part of your application or Return.

We'll expect to see the plan has been informed by consultation.

University and Higher Education museums – types 1-3

University and Higher Education museums might work within multiple plans and planning cycles. Often a strategy or similar provides the context for planning.

The school or department may also then respond to this with their own plan.

Whatever the context, we would expect to see a museum plan tying into the most closely related strategy or plan.

We'll expect to see the plan has been informed by consultation.

We'll want to see all levels of the plan, along with appropriate approvals, as part of your application or Return.

National museums

Nationally-styled museums

We'll expect to see formal consultation processes with internal and external stakeholders in place for your forward or business plan.

We'll check that you have a review mechanism in place for your plan and how you're monitoring your performance and using this information to improve services.

You'll need to show where your plan demonstrates national aspiration and delivery.

What we're looking for, requirement 2.1 checklist:

- that the statement of purpose is consistent with your governing document
- the elements of the forward or business plan to see that there's appropriate detail for the size and type of your museum
- a clear link between aims, objectives and resources – that the plan is achievable
- action and resource planning to achieve your objectives
- that the plan links effectively to associated strategies, plans and policies
- a clear process for approval of your plan is in place (appropriate to governance type) and accompanying evidence of approval
- that the forward or business plan covers at least the current and subsequent planning year (led by the museum's own financial and planning cycles)

2.2 Financial sustainability

All museums		
To meet the Standard, you'll need:	Why is this important?	What evidence is needed?
2.2 Financial sustainability	<p>Museums must be resilient and sustainable to survive.</p> <p>You must be able to demonstrate that your museum is financially sustainable with the financial resources to deliver your forward/ business plan.</p> <p>This shows us that you are a long-term organisation and confirms that you are not unethically selling collections or using them as collateral.</p>	<p>You'll need to provide copies of accounts for the last two available financial planning years. These should show final income and expenditure for the previous two years for your museum operation (or a web link to published accounts).</p> <p>Income and expenditure must be clear, regardless of the size of the budget.</p>

Independent museums – types 1-3

Last two years of audited accounts as required by appropriate Regulator, such as the Charity Commission/Office of the Scottish Charity Regulator.

Where your museum's operating budget is below the charity regulator's reporting thresholds your accounts don't need to be audited but you'll need to show that you're meeting charity reporting requirements and/or keeping accounting records.

Local authority museums – types 1-3

Actual final income and expenditure for the previous two years. Council budget books are not acceptable, although evidence should remain compliant with governing body procedures.

Details of cost centre breakdowns for specific museum related activity and expenditure should be provided.

University and Higher Education museums – types 1-3

Actual final income and expenditure for previous two years.

National museums

Annual accounts for the previous two years as published.

Nationally-styled museums

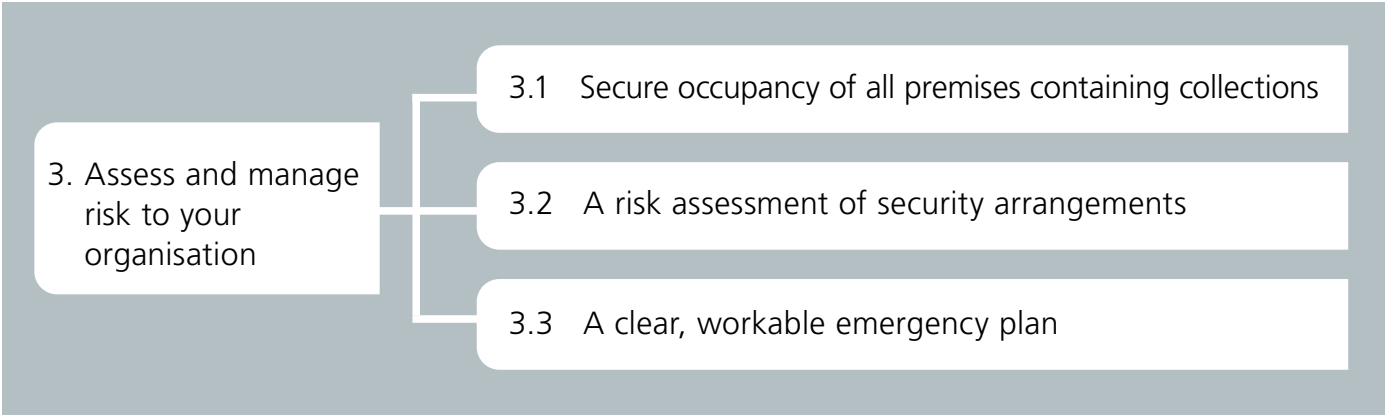
Annual accounts for the previous two years as published.

What we're looking for, requirement 2.2 checklist:

- how you manage your finances and allocate these to identified objectives
- the accounts to be sufficiently detailed to show expenditure on museum activities such as conservation, exhibitions, premises maintenance, workforce
- financial sustainability and that the museum isn't overly dependent on one source of funding and that any associated risks are being considered and mitigated
- that collections are not being used as collateral (where something is put up as security for repayment of a loan) or being used as a source of income through unethical sale

3. Assess and manage risk to your organisation

To meet the Standard, you'll need to provide evidence that you have each of the following:



3.1 Secure occupancy of all premises containing collections

All museums		
To meet the Standard, you'll need:	Why is this important?	What evidence is needed?
3.1 Secure occupancy of all premises containing collections	Your occupancy arrangements must be sufficient to keep your displayed and stored collections secure and allow time to plan if you need to relocate them.	You'll be asked to confirm occupancy information for all buildings holding collections. Where occupancy arrangements cover less than 12 months, you'll be asked to outline your contingency planning to ensure the long-term protection of the collection (for example showing contingency planning in your forward or business plan).

Legal definitions and meaning in relation to land law and ownership vary across the UK, particularly between Scotland and England, so occupancy arrangements can be found in:

- Freehold documentation absolute interests in land (Scotland)
- Tenancies
- Leaseholds
- Licences
- Permissions to occupy (Ministry of Defence)
- Other forms of tenancy agreement

We won't normally ask to see written terms of occupancy, other than in complex cases or where challenges have been highlighted as part of previous assessments.

What we're looking for, requirement 3.1 checklist:

- that long-term arrangements (usually at least 12 months) are in place
- short notice periods and whether risks relating to these are referenced in the forward/business plan
 - including evidence of contingency planning to ensure the long-term care of the collection
- whether any buildings are occupied without formal written agreements and what evidence or explanation has been provided
- that all buildings housing collections have been included, if we come on a site visit

3.2 A risk assessment of security arrangements

All museums		
To meet the Standard, you'll need:	Why is this important?	What evidence is needed?
3.2 A risk assessment of security arrangements	<p>The purpose of the assessment is to identify threats that can impact people (the workforce, visitors and external contractors), collections, operations and buildings. It will consider the risk these threats pose to your organisation.</p> <p>The assessment helps you have a clear understanding of those risks that need prioritising and will help you work through how to address and manage them.</p>	<p>The security measures to be implemented will depend on the risks and vulnerabilities identified for your museum, as well as the organisation's overall risk tolerance.</p> <p>Security arrangements should cover your workforce, visitors, buildings and collections – in store, on display, in offices or off-site. Collections information also needs to be kept secure.</p> <p>Arrangements for all these areas should be reviewed regularly, with the risk assessment refreshed annually. We will check the last review date when asking for evidence.</p> <p>You'll need to show how measures to mitigate the risks and vulnerabilities have been, or will be, implemented, for example by providing references from your forward or business plan.</p>

It's important to consider and assess what threats there are to your assets. These can include fire/arson, water egress, pests, climate change, cyber threats, accidental damage, theft, vandalism, protests, social unrest and terrorism.

Security advice can come in a variety of forms – if you can, you should get expert advice. This could be from:

- An independent consultant or consultancy firm with a proven background and knowledge of museum security
- Your local police liaison/ community safety officer
- The Security and Protection Advice Team at Arts Council England if you have or are planning to receive loans from national collections or for which you are applying to the Government Indemnity Scheme

The security advice will need to look at all aspects of your museum and collections. This will include, but is not limited to, the physical security of the building, technical systems, operational procedures and information security - for example, how you keep information about collection items' financial values secure.

If you can't get expert advice, we'll expect you to carry out your own risk assessment. Arts Council England provides open-access security advice and templates to support you in assessing and managing risks. These resources are available on **The Collections Trust website**.

A security report could be produced from notes you've made of verbal recommendations, your own audit or a formal report received from a security expert. We will not ask you to send this in with your online form.

If we visit you as part of your Accreditation assessment, we'll ask to see your security assessment.

What we're looking for, requirement 3.2 checklist:

- evidence that the security risk assessment covers all relevant risks and is proportionate to the size and type of your museum, as well as the nature, scale, and value of your collections
- confirmation that you have a plan in place for implementing any security arrangements needed as a result of the security risk assessment carried out
- how many security measures you've implemented and whether any security improvements arising from the assessment are referenced in your business plan
- date of your last security assessment

3.3 A clear, workable emergency plan

All museums		
To meet the Standard, you'll need:	Why is this important?	What evidence is needed?
3.3 A clear, workable emergency plan	<p>Having a comprehensive emergency plan that you've tested ensures that you can respond quickly and effectively to emergencies or disaster situations, protecting your assets and minimising disruptions to your operations.</p> <p>This should include evacuation procedures for everyone in all of the museum buildings – with specific procedures for disabled people.</p>	<p>Your emergency plan will need to be appropriate to your museum, collections and context. It will include:</p> <ul style="list-style-type: none"> • Arrangements for the staff and volunteers, visitors, collections, buildings and information you hold. These arrangements are dependent on the risk assessment outcomes. • Information on how the plan is authorised, maintained, communicated, tested, and made available to your staff and volunteers and the emergency services • How you work with the emergency services and communicate with the media • How your plan links to any other relevant emergency plans, for example if you share a building with another organisation • An understanding of salvage priorities and information on first aid steps for damaged objects • A review procedure and date of review <p>You'll need to confirm what elements the emergency plan covers and when it was last reviewed.</p>

Your plan should cover the procedures you will implement in an emergency and will outline the actions you will take to secure and care for all your assets, both during and after an emergency. You should include evacuation procedures, meeting points, social media response and information sharing.

What arrangements do you have for evacuating wheelchair users and visitors with limited mobility? For people with sensory needs, what measures are in place for clear emergency guidance? A salvage list for the collections needs to be included in the plan, outlining how items need to be handled and prioritised during the evacuation by the salvage team. A simplified copy of the salvage list with only key information should be shared with the fire brigade to help support them in case of a fire evacuation. If these procedures are outlined in other documents, you'll need to let us know where in your application.

Everyone who works at the museum should know about the emergency plan. There should be regular testing and discussions around emergency planning with the whole workforce.

Your emergency plan should inform your collections care processes and procedures, for example, when selecting priority objects for salvage and retrieval. We will usually only ask you for a copy of your plan if we visit you for an Accreditation site visit, if your museum has undergone a major redevelopment or where we have concerns.

You'll need to review the plan at least annually, and immediately after any significant changes to buildings, operations or exhibitions which may increase the risks. This may be due to high monetary values of exhibits or controversial sponsorship or exhibition theme. If you have suffered a disaster situation you must review your response and actions. You will need to look at how well your plan has worked and make any changes to improve it as needed.

What we're looking for, requirement 3.3 checklist:

- that the emergency plan covers arrangements for the workforce, visitors, collections, buildings and information you hold
- information on how you authorise, maintain, communicate your plan, and how you make it available to your workforce and the emergency services
- information on how frequently staff and volunteers receive training in emergency procedures
- the date your emergency plan was last reviewed

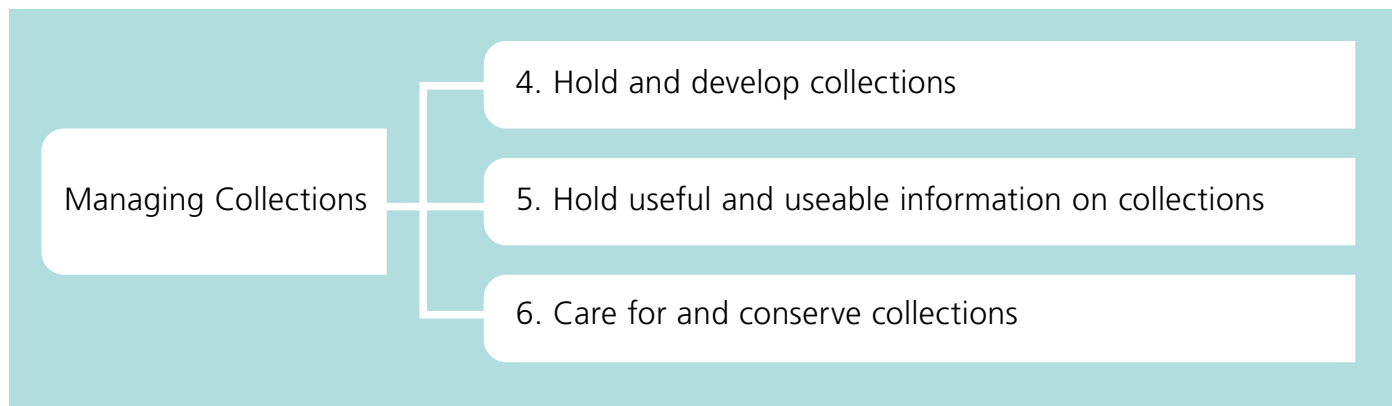
Guidance notes for Accreditation Standard requirements 4-6, Managing Collections

These three requirements of the Accreditation Standard look at how you manage your collections. It will cover how you develop, document and look after your collections. Different museums approach collections management and planning in different ways.

You may have brought together all your collections management policies into a single document. Your plans might appear in a separate document or within your forward/business plan.

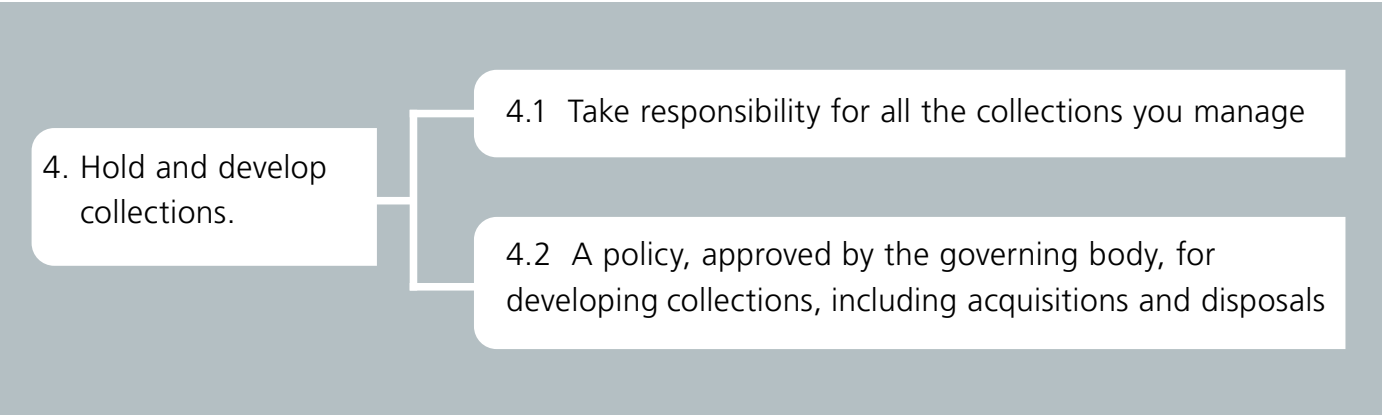
Larger organisations may develop a suite of policies across all areas of collection development, collection documentation, collection care, and conservation and collection access.

In each case you'll need to reference the relevant document or section on the application form.



4. Hold and develop collections

To meet the Standard, you'll need to provide evidence that you have each of the following:



4.1 Take responsibility for all the collections you manage

All museums		
To meet the Standard, you'll need:	Why is this important?	What evidence is needed?
4.1 To take responsibility for all the collections you manage	<p>To be accountable for your collections you need to know what you own and which collections are on loan.</p> <p>You need to ensure you have up to date loan and location documentation.</p> <p>Robust ownership and loan and /or management agreements are critical for the long-term sustainability of your museum.</p>	<p>You'll be asked to confirm the size of your collection, the proportion the museum owns, the proportion on loan to it and whether any associated loan agreements are up to date.</p> <p>If most of your collection is on loan, we'll ask you to explain the loan arrangements in place and assess any risks.</p> <p>You'll only need to upload copies of key loan agreements if these relate to a sizeable proportion of the museum's collection (more than 50%).</p>

Your museum policy documents and procedures should show the ownership arrangements of the current collections and who will own new acquisitions to the collections **(see 4.2 below)**.

Often the governing body will own the majority of collections, but it may be the case that all, or a significant proportion of the collections, are owned by a separate organisation or individual/s, for example a local authority or a separate collections trust.

If you hold any collections that are on loan to your museum, the duration of the loan must be appropriate and include regular review between your museum and the owner (the lender). The term 'permanent loan' has no legal status and should be avoided. You should make sure that all loans have an associated fixed term loan agreement meeting Spectrum Standards **(see 5.2)**.

What we're looking for, requirement 4.1 checklist:

- what proportion of the collection is on loan and if there are up to date loan agreements in place. If not, we'll check how the ownership of legacy loans is being managed
- if most of the collection is on loan, we'll want to know you're aware of and are managing any associated risks
- we'll cross-reference with your response to **sections 4.2** (collections development policy) and **5.2** (Spectrum primary procedures) to check if collections with unclear ownership feature within your documentation plan
- if you have attached a service level agreement or significant loan/management agreement, we'll check to see who is responsible for new acquisitions and disposals. This agreement should be signed by both parties

4.2 A policy, approved by the governing body, for developing collections, including acquisitions and disposals

All museums		
To meet the Standard, you'll need:	Why is this important?	What evidence is needed?
4.2 A policy, approved by the governing body, for developing collections, including acquisitions and disposals	<p>The policy guides the development of your collections. It shows how collections development links to the museum's statement of purpose and meets ethical commitments and legal requirements. Using the Accreditation template as the basis for your policy means UK museums have a shared language in relation to acquisition and disposal.</p>	<p>Your collections development policy must include:</p> <ul style="list-style-type: none"> • Your statement of purpose • A history of the collections • An overview of current collections • Themes and priorities for future collecting • Themes and priorities for rationalisation and disposal • Information on the legal and ethical framework for acquisition and disposal • Reference to the collecting policies of other museums where you collect in the same or related areas or subject fields. Reference to any formal collecting relationships for example joint acquisition agreements etc • Review date <p>You'll be asked for a copy of your collections development policy with signed approval. If you've published elements of your collections development policy separately, for example a spoliation statement or a due diligence policy then you need to provide links to the published documents with relevant approvals.</p>

Use the current Accreditation **Collections Development Policy** template alongside these Guidance notes.

Collections development policies should be reviewed at least every five years. It's a good idea to make the policy start and end dates really clear on your document.

The collections development policy template was developed to help museums produce a robust and effective policy. The template includes standard clauses that all museums should include. Many of these relate to the legal responsibilities of museums as directed through Acts of Parliament, or International Conventions to which the UK is signatory. The standard clauses in our template have been checked so museums don't have to seek separate legal advice. We'll read your policy thoroughly and will check that any changes to the template clauses don't dilute the meaning of the wording.

Practical guidance notes: how do we fill the template in?

These notes are to read alongside the template to help you write, review or update your own policy. It's important that it is the museum's policy and that it works in your context. The italics in the template show you where to add your own text and include your museum details. In some places you can choose from different paragraphs or clauses so select the option which fits with your museum policy approach.

You can also adapt your policy to select the clauses appropriate to your relevant Accreditation organisation:

- Arts Council England
- The Welsh Government
- Museums Galleries Scotland
- Northern Ireland Museums Council

1 Introduction

This section should include your museum's statement of purpose as the development of collections will be led by this. Describe which other policies or plans it relates to.

2 History of the collections

This section is about the history of your collection. Are there any key milestones in the development of your collections such as significant acquisitions or particularly influential curators and donors? Have there been any major changes in focus for the collections?

If so, outline these and describe any key disposals (where relevant).

3 Overview of current collections

This section considers your collection strengths, weaknesses, and current uses. Describe what is in the accessioned collection, its size, coverage and significance. Are there any areas which are particularly strong? What types of collection do you hold and are these physical or digital? How does your collection fit with your statement of purpose and key aims? Are there any parts of your collection which don't fit with this?

Include any material that you haven't accessioned and explain why you've decided it's not appropriate, for example a handling collection or surrogates.

4 Themes and priorities for future collecting

What are your priorities for collecting? What are you planning to collect and why? How does this relate to your museum's wider statement of purpose and forward/business planning? Are there any restrictions on this and if so, why?

Being clear about this will help guide strategic decision making and will support practical objects entry procedures.

5 Themes and priorities for rationalisation and disposal

Collections rationalisation is as important as ongoing collecting to ensure sustainability and relevance. What's your approach and how does this fit in with your forward plan? Which areas of the collections will be considered for rationalisation and disposal and why? Are there any restrictions on this and if so, why? For example, it's not permitted within your museum's governance or bequest conditions.

You could also tell us if this isn't a priority within the period of your policy (there's no active rationalisation and disposal). There may be reasons you'll need to undertake disposals for legal, safety or care and conservation reasons (for example spoliation, radiation, infestation, repatriation). These are some areas you could consider in your policy.

6 Information on the legal and ethical framework for acquisition and disposal

This section describes the legal and ethical frameworks that the museum works within. The standard paragraph references the MA Code of Ethics which is a minimum requirement. We've already covered the primary legal and ethical elements requirement of all Accredited museums in the template text so that's why we encourage you to use it. You may add additional ones in this section, where appropriate.

7 Collecting policies of other museums

List any museums and other public institutions which you work with in relation to shared interest in collecting. This might be a formal collecting relationship with another museum such as a joint acquisition agreement or a nearby museum with an overlapping collecting remit.

8 Archival holdings

This clause is optional depending on whether your museum holds or intends to collect material which may be considered archival, for example documents and photographs – in physical or digital formats. If so, describe your rationale and approach to developing this collection.

Museums with substantial archival material may also wish to look at the **Archive Service Accreditation Scheme** for these collections.

9 Acquisition

Use this section to describe your authorisation policy for agreeing acquisitions. For example, this might include levels of delegation relating to costs of acquisition. There are standard paragraphs to include in this section.

10 Human remains

Whether or not your museum holds or collects human remains you'll still need to choose from the standard paragraphs in the template. You can expand on this if you do hold or intend to collect human remains into the collection.

11 Biological and geological material

Choose the appropriate paragraph for your museum.

12 Archaeological material

You'll need to choose from the paragraphs in this section, as appropriate.

13 Exceptions

This section outlines when exceptions to the broader collecting policy relating to exceptional circumstances might occur. We've included a standard paragraph for this.

14 Spoliation

This section describes your policy relating to spoliation of works of art during the Holocaust and Second World War period. We've included a standard paragraph for this so choose the one which applies for your governance type.

15 Repatriation and restitution of objects and human remains

This section describes your museum's policy relating to the returning of objects and human remains. You'll need to choose from the paragraphs in this section, as appropriate.

16 Disposals procedures

This section confirms you have an agreed and approved method in place for taking objects out of your long-term collections. It will be useful to also review the information in the updated Museums Association **Disposals toolkit: Off the Shelf** You can choose which paragraphs to use from the disposal by exchange section within the template.

National museums

Nationally-styled museums

You'll be asked how your collection's national importance and international interest in it supports your National or nationally-styled name and stated objectives.

We'll expect your policy to cover your approach to collecting items of national scope and importance, along with associated information about the collections.

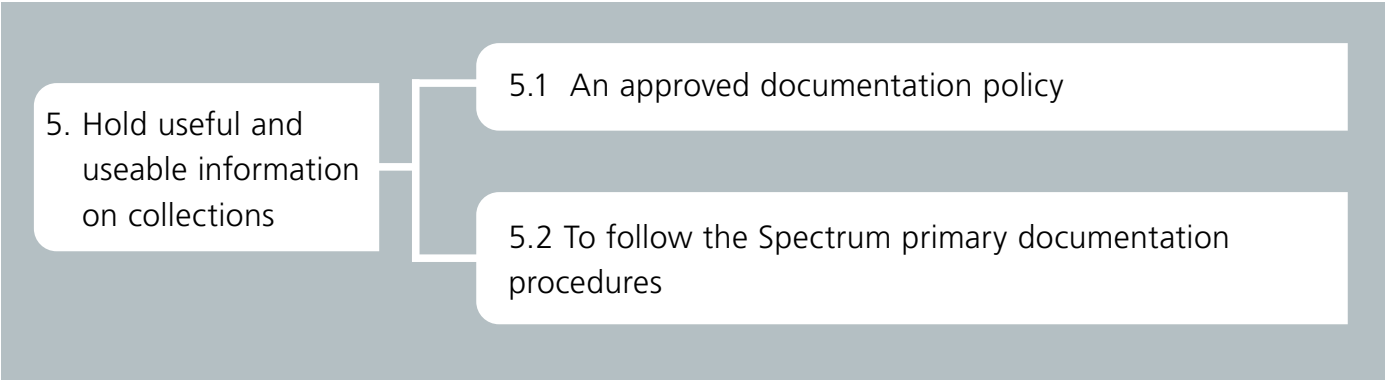
You'll need to tell us how you have developed your collection over the last 12 months.

What we're looking for, requirement 4.2 checklist:

- that the policy fits with the statement of purpose and is proportionate
- that the policy is compliant with the required legal and ethical clauses in the template
- If the constitution of your museum doesn't permit the inclusion of all the required clauses we'll check that there are safeguards in place to ensure the long-term preservation of the collection, and responsibility for acquisition and disposal procedures
- that the description of the collections provides a clear overview to guide future acquisitions and/or disposal as appropriate
- appropriate information about rationalisation and disposal
- that you've included relevant collecting remits of other museums, local record offices, archives and other public institutions
- signed approval in place
- if the collection is owned by a separate organisation as described in a loan or management agreement we may need to check approvals from both the collection owning body and the collection managing body. It depends how your policy approval powers have been delegated
- your policy covers a clear time period and that it has been reviewed within the last five years

5. Hold useful and useable information on collections

To meet the Standard, you'll need to provide evidence that you have each of the following:



5.1 An approved documentation policy

All museums		
To meet the Standard, you'll need:	Why is this important?	What evidence is needed?
5.1 An approved documentation policy	<p>The policy or statement ensures your collections documentation provides you with useful and useable information</p> <p>It should link with your statement of purpose, and meet ethical commitments and legal requirements.</p> <p>Collections information should reflect the different communities represented in the collection.</p>	<p>The documentation policy or statement should aim to cover the following areas:</p> <ul style="list-style-type: none">• Accountability – ensuring you record sufficient information about the objects, so that each object for which you're legally responsible (including loans) can be identified and located• Standards in procedures and processes – with a commitment to maintaining minimum professional standards, for example Spectrum• Accessibility – the policy should define how people can access collection information• Security – by ensuring measures are in place for the security and long-term preservation of documentation records, whether physical or digital including back up and secure storage

All museums		
To meet the Standard, you'll need:	Why is this important?	What evidence is needed?
5.1 An approved documentation policy		<p>The policy should be reviewed and approved by your governing body at least every five years or earlier whenever there is a change with potential implications for collections management.</p> <p>You'll be asked for a copy of your documentation policy or statement with signed approval.</p> <p>If you have a wider collections management policy, just tell us where to find the details about collections documentation.</p>

The policy should take into account that electronic systems will become outdated. You will need to ensure long-term access to the information held.

If the operation of the museum is outsourced to a third party, there should be a clear relationship between the management agreement and the collections documentation policy. Mechanisms for auditing collections documentation against required standards should be explicit in the management agreement. It's important that both parties have defined roles and responsibilities so that there's no duplication and it's clear who is accountable for different areas, such as data control and requests for collections access.

What we're looking for, requirement 5.1 checklist:

- that the policy is appropriate for the size and scale of museum
- that the policy fits with the statement of purpose and key aims of your museum
- signed approval in place
- that the policy draws upon the relevant policy guidance in Spectrum
- that the policy reflects the requirements of a management agreement (where museum operations are outsourced)
- that the policy covers a time period and has been reviewed within the last five years

5.2 Follow the Spectrum primary procedures

All museums		
To meet the Standard, you'll need:	Why is this important?	What evidence is needed?
<p>5.2 To follow the Spectrum primary documentation procedures</p>	<p>The Spectrum primary procedures within the UK collection management standard are essential for managing collections effectively.</p> <p>They help you make the collection accessible and secure.</p> <p>They support the accountability of your governing body.</p> <p>It's important for stakeholders to know collections are documented adequately and that the museum is following museum Standards for collections information.</p> <p>You may choose to use additional Spectrum procedures to improve your accountability for collections in your care.</p>	<p>Your documentation procedures manual should, as a minimum, cover the primary documentation procedures in the Spectrum Standard:</p> <ul style="list-style-type: none"> • <i>Object entry</i> • <i>Acquisition and accessioning</i> • <i>Location and movement control</i> • <i>Inventory</i> • <i>Cataloguing</i> • <i>Object exit</i> • <i>Loans in (borrowing objects)</i> • <i>Loans out (lending objects)</i> • <i>Documentation planning</i> <p>You should plan to improve the accuracy and usability of documentation over time.</p> <p>You'll need to confirm that you've implemented the Spectrum primary procedures and that you have a manual outlining the step-by-step instructions for carrying out and maintaining the procedures at your museum.</p> <p>You'll need to tell us whether you've achieved the Spectrum Standard for Inventory and if not, when you expect to achieve this.</p>

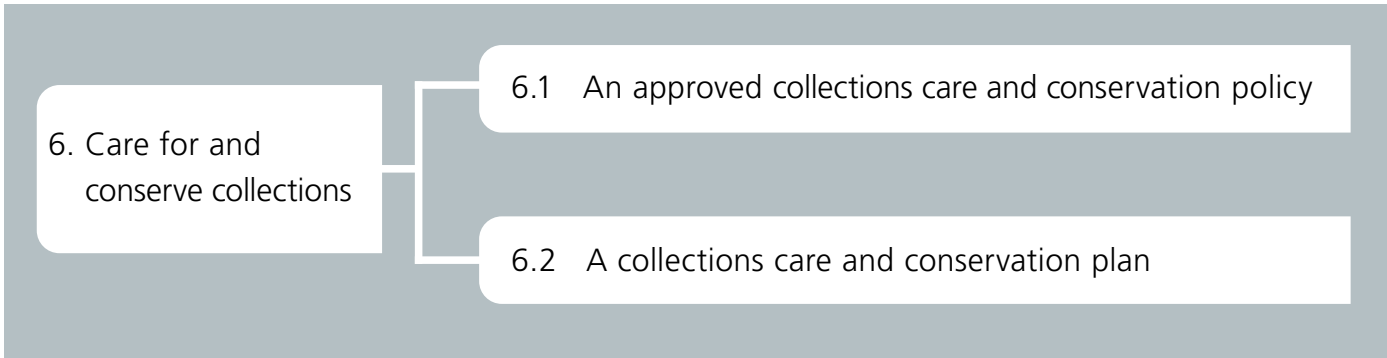
If we ask, you'll need to provide your written documentation plan. If we visit you, we may ask to see your procedural manual and ask to see how you put this into practice.

What we'll looking for, requirement 5.2 checklist:

- how you are implementing the primary procedures in the Spectrum Standard
- your documentation procedures manual being up to date
- that you've met the Spectrum Standard for Inventory and if not, we'll want to know how you're planning to resolve an inventory backlog or backlogs. You'll be able to explain this in your documentation plan with timescales for achieving this
- how you intend to develop your collection documentation and that you have a written plan showing priorities and timescales as described in the Spectrum Standard for *Documentation planning*

6. Care for and conserve collections

To meet the Standard, you'll need to provide evidence that you have each of the following:



6.1 An approved collections care and conservation policy

All museums		
To meet the Standard, you'll need:	Why is this important?	What evidence is needed?
6.1 An approved collections care and conservation policy	<p>The policy or statement outlines the organisation's responsibility for caring for the collection.</p> <p>It shows how your collections care and conservation activities contribute to ensuring the long-term preservation of collections.</p> <p>It should link to your organisation's statement of purpose, and meet ethical, commitments, environmental sustainability and legal requirements.</p>	<p>Your policy or statement should be based on a combination of preventative and remedial conservation, both designed to ensure a sustainable approach to long-term preservation.</p> <p>It should relate to the collections whether on display, on loan or in store.</p> <p>The policy should cover:</p> <ul style="list-style-type: none">• Standards – the relevant standards and frameworks you use to look after your collections, for example Benchmarks in Collections Care• Expertise – how you receive regular advice from conservation and collection care experts, whether in-house or freelance

All museums

To meet the Standard, you'll need:	Why is this important?	What evidence is needed?
<p>6.1 An approved collections care and conservation policy</p>		<ul style="list-style-type: none"> • Specialist collections - specific procedures for specialist collections, for example, working historic machinery or natural science collections • Communication – how the policy is communicated to your workforce, contractors and users <p>The policy should be reviewed and approved by your governing body at least every five years.</p> <p>You'll need to provide a copy of your collections care and conservation policy or statement with signed approval. Your collections care and conservation policy may be part of your wider collections management policy, care and conservation plan, or in your forward or business plan, in which case tell us the document and section.</p>

There are two types of conservation:

- Preventative conservation covers the measures necessary to slow down or minimise deterioration of museum objects and specimens
- Remedial conservation involves treatment to an object or specimen to stabilise it or enhance some aspects of it

Where the operation of a museum has been outsourced to a third party there should be a clear relationship between the management agreement and the collections care and conservation policy. Mechanisms for auditing collections condition against required standards should be explicit in the management agreement. It's important that both parties have separately defined roles and responsibilities so that there's no duplication and it's clear who is responsible for different areas such as insurance, conservation and maintenance.

What we'll look for, requirement 6.1 checklist:

- that the policy is appropriate for the size and type of your museum and proportionate with your wider forward/business plan and available resources
- that the policy fits with the statement of purpose and key aims of your museum
- how appropriate the policy is for the types of material in your collections
- that you have outlined your arrangements for accessing appropriate collections care and conservation advice
- your policy has signed approval in place
- the policy reflects the requirements of a management agreement (where museum operations are outsourced)
- the policy covers a defined time period and that it has been reviewed within the last five years

6.2 A collections care and conservation plan

All museums		
To meet the Standard, you'll need:	Why is this important?	What evidence is needed?
6.2 A collections care and conservation plan	<p>Looking after collections is a long-term commitment. A collections care and conservation plan sets out your priorities and activities and the resources required.</p> <p>It should cover all parts of the museum where collections are sited, including storage.</p> <p>Good building maintenance helps maintain stable environments for collections.</p> <p>Adapting a building to be able to deal with extreme weather events and overheating should be considered as part of the long-term collections care plan.</p> <p>Consider the environmental impact of your current collections care activity and include planning, taking expert advice where possible, for informed, realistic and achievable action to reduce your carbon footprint.</p>	<p>You'll be asked to confirm the areas covered by your collections care and conservation plan.</p> <p>You should have a plan to maintain and, where possible, sustainably improve your collections care over time. Priority should be established through regular review and assessment, covering the condition of the collections and the environment in which they're stored.</p> <p>The areas we will expect to see covered in your plan are outlined by museum type below.</p> <p>Your collections care and conservation plan may be a separate document or part of a wider plan.</p>

Independent museums – types 1-2

A basic conservation plan should include:

- An overview of current collections care and conservation
- An awareness of collection needs including vulnerable items and priorities for action with timescales
- Arrangements for building condition, adaptation and maintenance to ensure that the building contributes towards providing appropriate environmental conditions for the different elements of the collection
- How you identify the main threats for collections on display and in store
- Arrangements for pest management, regular cleaning and inspection, appropriate packing and storage techniques, materials and equipment
- Arrangements for environmental monitoring, control and equipment maintenance for locations where you have collections
- What resources are available? Who does this, what training they receive and how you access professional conservation advice?

Independent museums – types 3

Local authority museums – types 1-3

University and Higher Education museums – types 1-3

National museums

Nationally-styled museums

The plan should include:

- An overview of current collections care and conservation
- An awareness of collection needs including vulnerable items and priorities for action with a planned programme of remedial and preventative conservation work
- Arrangements for building condition, adaptation, and maintenance to ensure that the building contributes towards providing appropriate environmental conditions for the different elements of the collection
- How you identify the main threats for collections on display and in store
- What your plan is based upon - for example, collections surveys such as Benchmarks for Collections Care

- Arrangements for pest management, regular cleaning and inspection, appropriate packing and storage techniques, materials and equipment
- Arrangements for environmental monitoring, control and equipment maintenance for locations where you have collections including frequency of monitoring
- What resources are available? Who does this, what training they receive and how you access professional conservation advice (whether in-house or contracted/freelance)?
- Arrangements for employing contract/freelance conservators
- Review periods and timetabled actions

If we ask to see it or we visit you, you'll need to provide your written care and conservation plan.

What we'll look for, requirement 6.2 checklist:

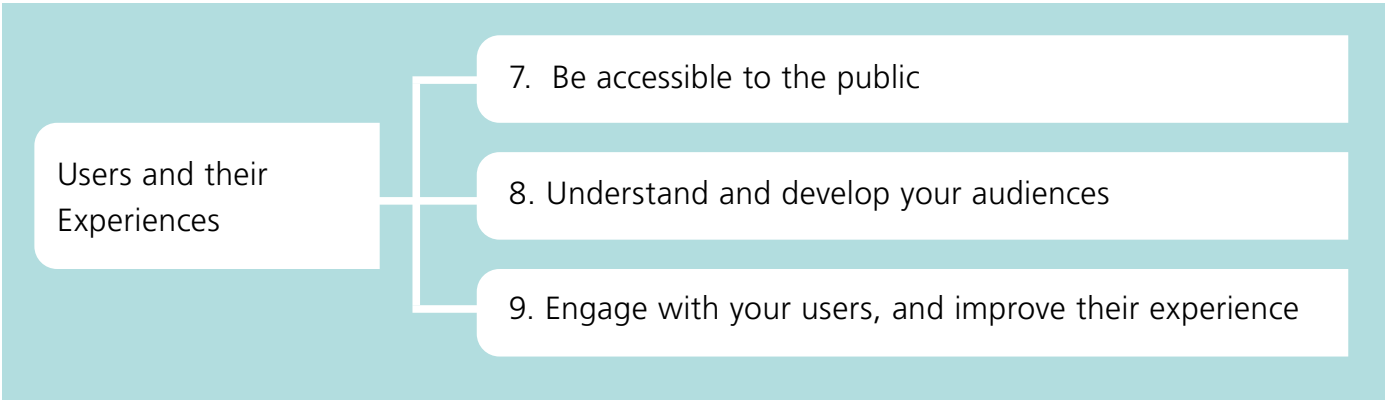
- how appropriate the plan is to your museum's size and the composition of your collections
- to understand how your plan has been developed. What have you used to prioritise your needs or base your plans on?
- that the plan includes an overview of current collections care and conservation, has timescales, and identifies the people, equipment and resources available to implement your plan
- that the workforce and any contract workers involved in the care and conservation of the collection are aware of the plan and trained in its implementation

Guidance notes for the Accreditation Standard requirements 7-9 – Users and their Experiences

These requirements look at how the museum supports access to culture and enable all people to enjoy a cultural life. It covers how you make collections accessible to the public, how you understand and develop your audiences, and how you engage with people to give them a better experience.

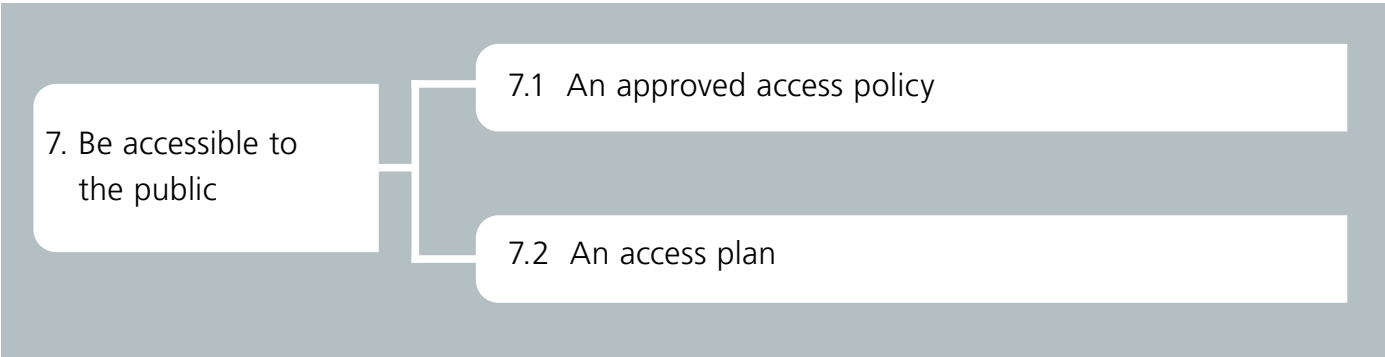
Museums may cover aspects of 7, 8 and 9 within overarching policy documents relating to audiences and access. Your plans may be included in your forward or business plan or within a specific access, audience development or learning and engagement plan. In each case you'll need to reference the relevant document or section on the application form.

To be fully Accredited a museum needs to be open to the public.



7. Be accessible to the public

To meet the Standard, you'll need to provide evidence that you have each of the following:



7.1 An approved access policy

All museums		
To meet the Standard, you'll need:	Why is this important?	What evidence is needed?
7.1 An approved access policy	<p>People need to be able to access your full range of services.</p> <p>Your access policy or statement should state your commitment to making services available to visitors. It should also cover your commitment to ensuring equitable access for people working at your museum – both paid staff and volunteers.</p> <p>Your services will include buildings, activities and events, interpretation, collections, information etc.</p> <p>Your access policy or statement will show how access provision links to the museum's statement of purpose as well as meeting ethical commitments and legal requirements.</p> <p>It is important to consider all types of access – physical, intellectual, sensory, social, geographical, cultural and financial factors.</p>	<p>Your museum should have an access policy or statement. This is not the same as providing visitor access information on your website.</p> <p>The policy or statement will include:</p> <ul style="list-style-type: none"> • How you identify people's differing needs • Your commitment to providing and improving access for people with protected characteristics by removing barriers to access • How people can engage, use, and reference your collection, gain access to your museum buildings and sites, and how you share information about the collection with people • Consideration of the use of languages other than English where this would make collections more accessible to local communities and visitors • How you balance the care and management of collections with access • The date you'll next review the policy <p>You'll need to confirm the time period your access policy covers and provide a copy of your access policy or statement with signed approval.</p> <p>We've included more specific details for different types of museum below.</p>

Independent museums – types 1-3

Your access policy should describe your organisational commitment to offer an inclusive service. You should outline how access is provided and what processes you have in place to evaluate, monitor, reflect and respond to users' needs and develop your collections, facilities and services.

Local authority museums – types 1-3

University and Higher Education museums – types 1-3

National museums

All of these types of museums must comply with the Public Sector Equality Duty and the Equality Act 2010.

In your access policy or statement you should also include the standards you've used to develop it.

The Welsh Language Act 1993 establishes the principle of language equality and notes specific steps to be followed by public bodies such as local authorities, health boards and government agencies – including organisations outside Wales that provide services to people in Wales.

Nationally-styled museums

This will relate to your museum's governance type.

What we'll look for, requirement 7.1 checklist:

- how the access policy has been shaped and shared so that stakeholders, users and potential users can see it, for example if it is available on your website
- that the access policy links to and guides forward or business planning
- how the policy covers all forms of access for example physical, intellectual, sensory, social, geographical, cultural, and financial factors
- how you've made provision of information in other languages in response to the needs of local communities
- how your statement is shared so users and potential users can see it
- that the policy covers a clear time period and has been reviewed in the last five years
- your policy has signed approval in place

7.2 An access plan

All museums		
To meet the Standard, you'll need:	Why is this important?	What evidence is needed?
7.2 An access plan	<p>To remain relevant to people's needs and expectations you should plan to improve access.</p> <p>This includes the physical, intellectual, sensory access to your museum.</p> <p>The access plan will reference access to collections and information about the collections as well as access to the museum site.</p> <p>It will help with identifying priorities, timescales and resources.</p>	<p>The plan should outline priorities for action based on your access policy or statement and recommendations from your access assessment.</p> <p>The access assessment may include:</p> <ul style="list-style-type: none"> • Access audit or access checklist • Work with focus groups, support agencies, advocacy groups, charities, experts with lived experience • Facilities checklist • Review of interpretation and collections use • Consultation with workforce • especially those front of house roles <p>The assessment can be carried out in-house or with external expertise. It should be carried out within the last five years, or more recently if there's been a significant change to your buildings or displays.</p> <p>Your plan will outline the procedures for:</p> <ul style="list-style-type: none"> • Public access – including how you provide information on what is and is not available for public access; how you provide access to collections both on display and in store and to information on the collections

All museums		
To meet the Standard, you'll need:	Why is this important?	What evidence is needed?
7.2 An access plan		<ul style="list-style-type: none"> • Research – your procedures for responding to research enquiries • Ensuring that plans are based on access to expert advice with consultation with relevant communities • Training for your workforce – how you ensure everyone is aware of access requirements <p>Public access provision could include:</p> <ul style="list-style-type: none"> • Guided tours, including stores • Facilitated school or group sessions • Promotional events • Identification sessions • Website/online collections access • Research facilities and materials • Catalogues • Online resources <p>Improving access to your buildings, sites, collections and collection information may include:</p> <ul style="list-style-type: none"> • Improvements to facilities • Alterations to improve the accessibility of your building/site • Signage • Increasing access to collections in store • Loans to other organisations • Development of online resources • Handling collections • Temporary exhibitions

All museums		
To meet the Standard, you'll need:	Why is this important?	What evidence is needed?
7.2 An access plan		<ul style="list-style-type: none">• Learning resources, outreach, loans services• Collections tours <p>You'll be asked whether you've had an access assessment in the last five years.</p> <p>You'll be asked to confirm the types of access you provide to users.</p> <p>You'll be asked to confirm the areas covered by your access plan and when the plan was last reviewed.</p> <p>Your access plan may be a separate document, within your forward or business plan or in an audience development plan.</p>

National museums

Nationally-styled museums

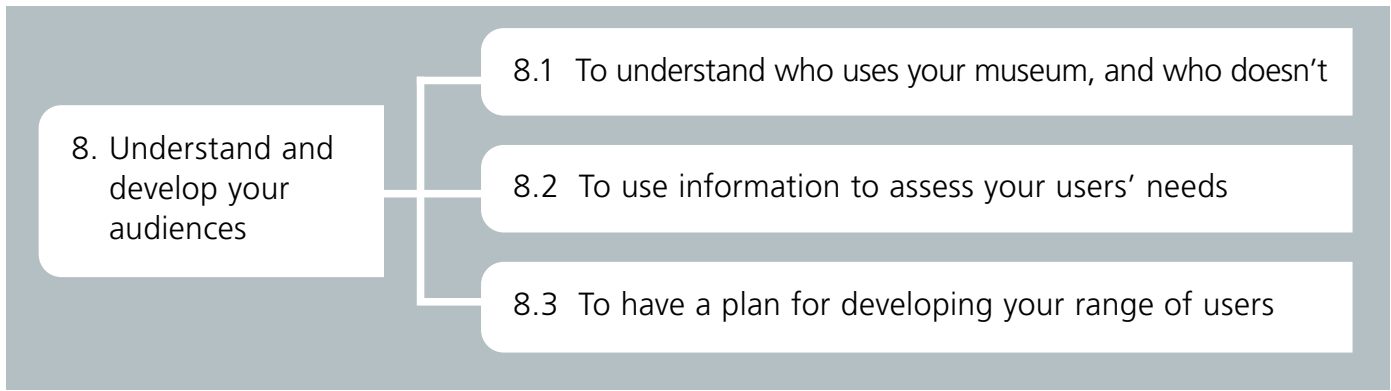
We'll also look at

- How you support other museums working in similar fields
- Your research programme, what staffing arrangements you have, to support research and how research is published

- What we'll look for, requirement 7.2 checklist:**
- that the access assessment has been completed within the last five years
 - that your access plan covers a clear time period
 - what types of access to your collection you provide to users
 - the balance of the collection on display, and how you provide access to the collections which aren't on display
 - how you've prioritised and planned to implement recommendations from your access assessment

8. Understand and develop your audiences

To meet the Standard, you'll need to provide evidence that you have each of the following:



8.1 To understand who uses your museum, and who doesn't

All museums		
To meet the Standard, you'll need:	Why is this important?	What evidence is needed?
8.1 To understand who uses your museum, and who doesn't	<p>Collecting information about the people who visit and those who don't will enable you to find out more about their needs and expectations.</p> <p>This data will help you plan improvements to how you deliver your service.</p>	<p>You'll need to confirm who your current users are as well as information about the people and communities who don't use the museum.</p> <p>We'll want to know what methods you use for data collection, consultation and feedback.</p> <p>You'll be asked to submit your plans for improving your provision for people and how you work with underrepresented groups.</p> <p>Your plan may be a separate document, or may be part of a wider strategic plan. If you haven't got a plan, you'll need to describe this on the form.</p>

Independent museums – types 1-2

Consulting or getting feedback from the people who visit your museum and those that don't currently needn't be expensive or difficult.

You may already gather some information on a regular basis. You may have to formalise meetings by taking notes and recording opinions for use in developing your forward or business plan.

You may also wish to undertake short visitor surveys or questionnaires to gather data.

Independent museums – types 3

Larger independent museums should consider formal consultation such as regular focus groups with people who currently visit and those that don't, including under-represented communities.

You should standardise how you collect data across the museum.

Consider benchmarking your museum against similar organisations or looking at your own data over time to track progress.

Local authority museums – types 1-3

University and Higher Education museums – types 1-3

You should use the information you have about who currently visits the museum to inform your planning.

Use any guidance or requirements from your governing body when considering consultation processes and public engagement requirements.

You should standardise how you collect data across the museum.

Consider benchmarking your museum against similar organisations or looking at your own data over time to track progress.

National museums

Nationally-styled museums

You should use the information you have about the people who currently visit your museum to help inform your planning.

Using a range of methods you should formalise consultation with those that currently visit and people who don't yet visit the museum.

You should standardise how you collect data across the museum.

Benchmark your museum against similar organisations or looking at your own data over time to track progress.

What we'll look for, requirement 8.1 checklist:

- that your forward or business plan identifies who currently visits the museum
- whether the consultation approaches you use are appropriate for the size and type of organisation
- your awareness of potential users and groups not currently accessing your museum

8.2 To use information to assess your users' needs

All museums		
To meet the Standard, you'll need:	Why is this important?	What evidence is needed?
8.2 To use information to assess your users' needs	Analysing and evaluating information about people's needs and experiences of visiting the museum helps with planning.	<p>You should have processes in place to respond to feedback.</p> <p>You should analyse and evaluate information and data to plan improvements to your services.</p> <p>You'll be asked to confirm that you have processes in place to analyse information.</p> <p>You'll need to show how your analysis and evaluation helps guide forward planning.</p>

Independent museums – types 1-2

We'll expect you to evaluate people's experiences of the services you offer and to find out about any possible barriers to participation.

You should use the results to develop and improve your services. This is most likely to be referenced in your forward or business plan.

Independent museums – types 3

Local authority museums – types 1-3

University and Higher Education museums – types 1-3

National museums

Nationally styled museums

To evaluate your visitor/user experience activity you should include a range of analysis tools and incorporate a mix of quantitative and qualitative approaches.

You should use the results to develop and improve your services. This is most likely to be referenced in your forward or business plan.

What we'll look for, requirement 8.2 checklist:

- how you evaluate and analyse collected information and data and how it is used to inform future planning
- that the analysis and evaluation is of a sufficient level of detail for your museum's size and type

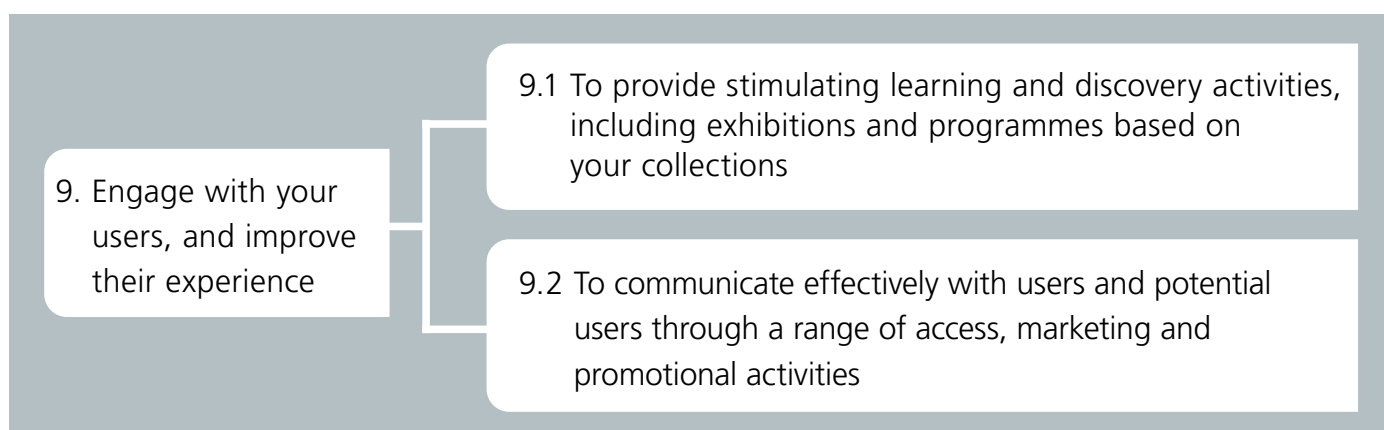
8.3 To have a plan for developing your range of users

All museums		
To meet the Standard, you'll need:	Why is this important?	What evidence is needed?
8.3 To have a plan for developing your range of users	<p>Becoming more inclusive and accessible will help your organisation as well as the people who visit or who would like to visit.</p> <p>You will gain a better understanding of who doesn't currently visit and why.</p> <p>You will work with people individually and in groups to overcome identified barriers to participation through planning.</p>	<p>You should use the information you've gathered and evaluated to inform plans to broaden the range of users and increase engagement with people - both in-person and online.</p> <p>These plans may be included in your forward/business plan or in wider strategic plans, for example an audience development plan.</p> <p>You'll need to provide your plan or show where your plans to broaden the range of users sit with reference to the relevant section of your forward plan or business plan and/or other relevant strategic planning documents.</p>

What we'll look for, requirement 8.3 checklist:

- what steps you've made to broaden the museum's current offer or provision to users and non-users
- an understanding of why some potential audiences are not using the museum and what plans you have to remove barriers to participation
- how you measure the success of your plans to increase participation

9 Engage with your users, and improve their experience



9.1 To provide stimulating learning and discovery activities, including exhibitions and programmes based on collections

All museums		
To meet the standard, you'll need	Why is this important?	What evidence is needed?
9.1 To provide stimulating learning and discovery activities, including exhibitions and programmes based on collections	<p>A museum should respond to a wide range of access needs and learning styles. This should be within its exhibition content, interpretation, programming and marketing.</p> <p>The whole museum team should understand the museum's role in learning, engagement and interpretation</p>	<p>You will provide a welcoming and stimulating learning and engagement environment. You will support learning and engagement in a variety of ways.</p> <p>You work with partners to facilitate effective learning and engagement.</p> <p>You'll be asked to confirm what activities you use to support learning and engagement.</p> <p>You'll need to show where your plans for learning and engagement link with your forward or business plan or with other plans.</p> <p>If you choose to participate in VAQAS, VAQAS Cymru, Tourism NI Quality Grading Scheme, Welcome Host schemes or similar you could tell us how this helps inform your planned improvements.</p>

Independent museums – types 1

Your learning and engagement activities are likely to include some of the following:

- Exhibitions and events
- A programme of lectures or talks
- Guided tours
- Interpreted collections
- Activities
- Partnerships to support learning. This might be a link with a local school or links with local community groups

Independent museums – types 2

Your learning and engagement activities are likely to include some of the following:

- Exhibitions and events
- An education programme supported by learning materials
- A programme of lectures or talks
- Guided tours
- Interpreted collections
- Activities
- Partnerships to support learning and engagement

Independent museums – types 3

Your learning and engagement activities are likely to include some of the following:

- Exhibitions and events
- An education programme supported by learning materials
- A programme of subject specialist lectures or talks
- Guided tours
- Interpreted collections
- A wide range of activities
- A formal learning offer

We'll expect to see evidence of a wide range of learning and engagement opportunities for people with different learning styles. You'll have well developed partnerships to support learning and engagement at the museum.

Local authority museums – types 1

Your learning and engagement activities are likely to include some of the following:

- Exhibitions and events
- A programme of lectures or talks
- Groups, self-led or guided tours
- Interpreted collections
- Activities
- Partnerships to support learning and engagement. This might be a link with a local school or with local community groups

Local authority museums – types 2-3

Your learning and engagement activities are likely to include some of the following:

- Exhibitions and events
- A programme of lectures or talks
- Groups, self-led or guided tours
- Interpreted collections
- Activities
- A range of partnerships to support learning and engagement. This might be a link with a local school or with local community groups

We'll expect to see evidence that a wide range of learning opportunities are offered for people with different learning styles.

University and Higher Education museums – type 1

Your learning and engagement activities are likely to include some of the following:

- Sessions with students
- Exhibitions and events
- A programme of lectures or talks that are available to the wider public
- Groups, self-led or guided tours
- Interpreted collections
- Activities

University and Higher Education museums – type 2-3

Your learning and engagement activities are likely to include some of the following:

- Sessions with students
- Exhibitions and events
- A programme of lectures or talks that are available to the wider public
- Groups, self-led or guided tours
- Interpreted collections
- Activities
- A range of partnerships to support learning and engagement. This might be a link with a local school or with local community groups

We'll expect to see evidence that a wide range of learning opportunities are offered for people with different learning styles.

There will be at least one member of staff with responsibility for learning. Learning staff should be represented on the senior management team. There will be a range of partnerships in place to support learning and engagement.

National museums

Nationally-styled museums

We'll expect to see evidence of a wide range of learning and engagement opportunities for people with different learning styles.

There'll be a number of learning staff at your museum, represented at senior management level and in project teams. There'll be a range of partnerships to support learning offers at the museum.

You'll need to provide a copy of your museum display/exhibition policy. This should cover how the programming supports the delivery of key aims, outlines the criteria used to develop exhibitions and cross references with your access policy and care and conservation policy.

You'll need to tell us what research and facilities are available for users.

You'll need to provide a breakdown showing how many people have used your research facilities in the last 12 months.

You'll need to attach a list of research your museum has published in recent years. You'll need to provide a copy of your published catalogue as an attachment or web link.

What we'll look for, requirement 9.1 checklist:

- how learning and engagement is supported by your museum
- whether learning and engagement activities reflect your collections
- whether or not learning resources reflect different learning needs and how you consult with a broad range of people to develop learning opportunities
- to see how learning and engagement opportunities are promoted and what information is made available to individuals or groups to facilitate their visit

9.2 To communicate effectively with users and potential users through a range of access, marketing and promotional activities

All museums		
To meet the Standard, you'll need:	Why is this important?	What evidence is needed?
9.2 To communicate effectively with users and potential users through a range of access, marketing and promotional activities	<p>Keeping up to date with the most effective ways to communicate and reach people, ensures that they can engage with your museum.</p> <p>Publicising practical access information online helps reassure visitors that they can access the museum.</p>	<p>There will be a range of accessible and appropriate ways for people to access information on your services both in print and online.</p> <p>You should publish information on location, how to get to the museum, opening times, facilities and services including details of current exhibitions and programmes and access to collections.</p> <p>The information you provide should include what provision you've made for people with additional access needs.</p> <p>You'll be asked to confirm what information you provide in print and online.</p> <p>You'll be asked to upload supporting documents or provide links to relevant pages on your website.</p> <p>If you have a marketing or communications plan you can include it if you wish. Other examples might include leaflets or posters to show us your promotional material.</p>

National museums

Nationally-styled museums

- You'll need to tell us how you ensure that the promotion of the museum with a national name meets people's expectations. This will relate to the size of the museum and the quality of its facilities.

What we'll look for, requirement 9.2 checklist:

- information on your opening arrangements to check your museum is a physical site/space/building which is open regularly, what published information you provide online and in print media
- whether you provide information in accessible formats, including languages other than English, and whether your website meets standard accessibility formats
- published access information
- whether you use different styles of communication to reach different groups of potential users
- in the case of a nationally-styled museum, whether the museum name is appropriate to its size and scale and reflects the quality of facilities against other nationally-styled and National museums

At the end of the online application or Return form you'll be asked if you'd like to share any significant achievements over the last few years. This helps your assessor highlight any key successes to the awarding panel.

