Making Accreditation work for you (2016)

The Accreditation Standard, the requirements and when they apply

Congratulations! Your museum has achieved / retained Accredited standard.

Museum Accreditation is a framework for running a resilient museum that continually improves the way it is run, the way it looks after its collections and the services it offers to the public. An internationally recognised museum standard, it is much more than an accolade to be achieved, celebrated and hung on the wall.

In the aftermath of the flurry of activity involved in pulling together an application or a return and the subsequent wait to hear the Accreditation Panel's decision, the purpose of the scheme as a living framework for running an exciting and successful museum can get lost.

The Accreditation team of the SW Museum Development Programme has put together a series of resources designed to help you put all your hard work to good use and reap the benefits of having an organisation-wide commitment to working to the Accreditation standard.

This one is a series of tabulated reminders of what each requirement covers and suggestions of when to use the various documents, policies, plans and procedures your museum now has in place to guide its operations.

The others can be downloaded from the SWMDP website and are

- Top Tips for Accredited Museums - ten ways to make Accreditation work for you
- A Work plan for Delivery and Improvement - key dates and activities during the 3 year period between Accreditation Application and Accreditation Return
- A list of Policies, Plan, Procedures, Agreements, Assessments and Charts required for Accreditation

Before you start, please make sure:
Everyone involved in the museum – paid and volunteer staff, the governing body - has an understanding of Accreditation and the importance and benefits of applying the standard to their work;

Everyone is aware of the resources that exist in and beyond the museum to help them – whether other members of the museum workforce, colleagues in neighbouring museums and the specialist development officers available through the SW Museum Development Programme or the online resources available at:

www.southwestmuseums.org.uk – information about Accreditation, contact details for the Development Officers and regional projects and project funding
 www.swfed.org.uk/resources – guidance, toolkits, case studies and links on every aspect of running a museum; information about the SW Museum Skills programme
www.artscouncil.org.uk/accreditation - Accreditation guidance and information about the application and returns process
www.collectionstrust.org.uk – guidance and information on collections management

Items marked ***** apply only to museums that manage a collection or museum owned by another organisation.

Section 1 – ORGANISATIONAL HEALTH		
REQUIREMENT	**REMEMBER …**	**USE …**
Statement of purpose (1.1)	• It underpins everything the museum does	• To direct the museum's work
Constitution (1.2)	• Trustees' responsibilities • The powers and obligations	• To guide how the museum is governed
Management arrangements (1.3)	• Record and notify any changes to delegation of powers • Trustee succession planning • Changes to management agreement with separate organisation (*)	• Succession planning to ensure Board is up to strength in numbers and skills • The requirements set out in the management agreement to plan and monitor your work (*)
Forward planning (1.4)	• Firm up the action plan and resource plan for the coming year in the 2nd half of the current year	• The action plan to direct and monitor workforce activity • The Forward Plan as a benchmark in your annual review with Museum Mentor
Premises (1.5)	• Be mindful of when lease/license runs out – start renewal negotiations early	
Financial basis (1.6)	• Ensure accounts are formally signed off by Trustees • Secure a copy of the accounts of Governing Body (*)	• The Forward Plan (action plan) to draw up a budget for the coming financial year
Workforce (1.7)	• Keep workforce agreements and role descriptions up to date • Keep induction materials up to date • Update the staff chart if there are changes to the staff structure • Plan and record development opportunities for all members of the workforce	• The workforce agreements with all staff and volunteers • The induction materials with all new staff, trustees and volunteers
Professional advice (1.8)	• Make sure that a professionally qualified member of staff still reports directly to the governing body (or person with delegated authority to take management decisions)	• Your agreement with your Museum Mentor and the ACE guidance to plan your contact over the year • The Forward Plan as the basis of the Annual Review with the

	• Keep in touch with your Museum Mentor and send them all Board papers	Museum Mentor
Emergency plan (1.9)	• Update the plan if there are changes to your buildings, content, layout or staff • Keep the emergency services briefed • Include the plan in the induction sessions for new staff/volunteers • Review the policy every 3 years	The plan to run a test exercise every year
Environmental sustainability (1.10)	• Ensure the approach to environmental sustainability is communicated to all members of the workforce and is implemented	• The policy when planning and delivering activities, services and events

Section 2 - COLLECTIONS		
REQUIREMENT	REMEMBER …	USE …
Collections development policy (2.2)	• Update the policy if necessary • Ensure the policy is included in the induction of trustees, staff and volunteers	• The policy to guide the acquisition, rationalisation and disposal of collections
Documentation policy (2.3)	• Review the policy within the timeframe stated • Ensure the policy is included in the induction of trustees and any staff or volunteers who work with collections	• The policy when drawing up documentation plans, and if reviewing procedures
Care & Conservation policy (2.4)	• Review the policy within the timeframe stated • Ensure the policy is included in the induction of trustees and any staff or volunteers who work with collections	• To inform when you need to contact a qualified conservator about an object or a situation • To inform your choice of professional to contact • When drawing up Care and Conservation plans, and if reviewing procedures • Refer to policy when lending an object and/or drawing up and monitoring a management agreement
Documentation plan (2.5)	• Include your doc plan in the	• To allocate workforce and

	Forward Plan	budgetary resources
	• Review progress against the predicted timeframe quarterly, adjust accordingly bearing in mind ACE requirements to clear backlogs within 7 years • Ensure all staff/volunteers working on documentation are aware of and implement the plan	• To guide and monitor progress towards clearing your documentation backlog
Care & Conservation plan (2.6)	• Include any planned improvements to collections care and conservation in your Forward Plan • Ensure all staff/volunteers working on collections care are aware of and implement the plan	1) To carry out museum's procedures: • To get an overview of the condition of the collections, • To monitor and control the environment in which collections are stored and displayed, • To ensure the buildings are suitable • To carry out housekeeping • To monitor and control pests • To handle objects correctly 2) To identify areas where improvements need to be made
Documentation procedural manual (2.7)	• Keep a copy in the area when objects are catalogued • Ensure all staff/volunteers cataloguing collections care are aware of and implement the plan	• To make sure the collections are catalogued consistently and to SPECTRUM standards
Security review and action plan (2.8)	• Schedule a review every five years	• To plan improvements to the security of the museum, collections, the workforce and visitors

Section 3: USERS AND THEIR EXPERIENCE		
REQUIREMENT	REMEMBER …	USE …
Understanding users and non-users, evaluate and analyse their needs (3.1.1 & 3.1.2)	• Build evaluation and consultation into your activities • Gather data in appropriate	• The data gathered to improve and target your activities

	ways, e.g. at reception, on feedback forms, comment boards, visitor book	
Plan to broaden your range of users (3.1.3)	• Include your audience development plans in your Forward Plan	• The data gathered from evaluation and consultation to identify potential users
A culture of customer care (3.1.4)	• Display your commitment to customer care on your website and at the museum • Include an introduction to the museum's purpose, facilities and customer care values in the induction for everyone working at the museum – from the governing body down	• Feedback from users to improve standards of customer care
Take account of user needs, guided by an access policy (3.1.5)	• Review access arrangements for people with additional needs whenever you plan a new activity • Stay abreast of equalities legislation • Have an access assessment at least every five years, sooner if there have been major changes • Include plans to improve access in your Forward Plan • Make the access policy available on your website and to everyone who works in the museum	• Your access assessment to plan improvements to access at the museum
Respond to tourism and other local priorities (3.1.6)	• Stay abreast of what's going on locally	• Local knowledge to stay at the heart of your community
User focussed experience – facilities and signage (3.2.1)	• Keep your website up to date • Implement cleaning rotas • Keep a list of nearby facilities at the reception desk and near all external phones • Check signage annually – particularly ones that are not under your control • Include plans to improve facilities and signage in your Forward Plan	• Visitor feedback to plan improvements • Your access audit to plan improvements

Marketing and promotion (3.2.2)	• Keep your website up to date, informative and engaging • Include access information on all your materials • Include plans to improve marketing in your Forward Plan	• Visitor feedback to plan improvements • Your access audit to plan improvements
Effective & engaging learning experiences (3.3.1 and 3.3.3)	• Partner local tourism and other bodies to create great learning experiences • Use a range of interpretative media to take account of the needs of different audiences and different learning styles • Include plans to improve learning and interpretation in your Forward Plan	• The data from your consultations and evaluations to plan your exhibitions and events • Contacts with local schools when developing learning materials
Access to collections for research (3.3.2)	• Make information for researchers available on your website • Negotiate publication of research on your collections, including the position with regards copyright, with the researcher from the start Include plans to increase research on your collections in your Forward Plan	• Your collections care plan to brief researchers on how to handle collections • The data from your consultations and evaluations to plan your events • Your collections documentation procedures to retrieve information about your collections to record new information