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Making Accreditation work for you (2016)

Top Tips to capitalise on all your hard work

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 (SWMDP) 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 shares 10 Top Tips to make sure Accreditation works for you. An A3 poster that summarises the tips in a graphic form can be downloaded from

<http://www.southwestmuseums.org.uk/publications-resources/accreditation-resources/>

The other resources can also be downloaded from the SWMDP website and are:

- A Workplan for Delivery and Improvement - key dates and activities during the 3 year period between Accreditation Application and Accreditation Return
- 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
- 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



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www.southwestmuseums.org.uk

Top Tips

1. File it



Maintain a file – either hard copy or digital – of all the documents associated with Accreditation, to provide continuity, mitigate against loss of institutional memory and help pull the information required for the Triennial Review together with minimal effort. Include:

- Your museum’s application and the documents submitted with the application/return
- The documents museums are required to have available for inspection on request (e.g. Access Assessment, Volunteer/Employee Handbook, Volunteer Agreement)
- Correspondence with Arts Council England
- The Museum Mentor/Museum Agreement and any associated paperwork (if applicable)
- Updates to Policies, Plans and Procedures, agreements, leases, etc. together with certified copies of the minute of approval
- Annual updates to the Forward Plan (in particular the action plan and progress with tackling Areas for Improvement)
- Accounts

2. Tackle Areas for Improvement



The letter from Arts Council England notifying your museum of the outcome of its application for Accreditation may have highlighted ‘Areas for Improvement’ that the Accreditation Panel would like you to address. You will have to report progress in tackling these when you submit your Triennial Return. Don’t let them hang about!

Plan how you’ll address them. If this involves a significant amount of work, add them as Objectives / Actions in your Forward Plan (if they are not there already) so that they are included in the overall plan of work for the coming months and don’t slip off the radar. Add a note to the Accreditation File when they have been addressed and ensure progress is noted in the Forward Plan.

3. Share the knowledge



Make sure the people who are responsible for an area of work – staff and volunteers – are familiar with the policies, procedures and plans that relate to it and have easy access to a copy of each to refer to if necessary. For example:

- Run a briefing session at a weekly planning meeting or arrange a workshop to cover topics in more depth.
- Remember to include them in the induction of new members of the workforce and the governing body.
- Test the Emergency Plan with the whole workforce.
- Put a bound copy of the documentation procedural manual in the area where items are catalogued and marked.

- Distribute (electronically or in hard copy) copies of the sections of the action plan for which individuals are responsible, so that they have their own or their team's own copy for reference.

4. Use the plans to monitor progress



Have the Forward Plan as a standing item on all management/governing body meeting agendas and report progress against each specific objective currently being worked on. This will confirm that everything is on track or highlight slippage at an early stage and enable additional resources to be allocated or the timeframe to be adjusted.

Do the same with the documentation backlog plan if it is not included in the Forward Plan and any other development/improvement plans.

5. Use the Forward Plan as a rolling document



Forward Plans include longer term aspirations – a Vision and Key Aims – and the shorter term steps and goals that will enable the museum to achieve them – the Action Plan, consisting of Specific Objectives, Actions and the resources required.

Three years is the recommended timeframe for an Action Plan, with Year 1 worked up in detail, Year 2 slightly less so and Year 3 sketchier again. By the fourth quarter of Year 1, the detail of Year 2 can be firmed up and that of Year 3 plotted more closely.

If your Key Aims have a longer life than just three years, you can add a fourth year on to your Action Plan at this stage to create a rolling programme: as one year's activity is achieved, another year is added on the end.

To do this you will take account of the current year's performance, touch base with the museums internal and external operating environment and consult. Doing this regularly as suggested in tip 4 means that drawing up a Forward Plan will not be the mammoth task it is sometimes perceived to be.

Working this way, the Governing Body/senior management will know when it's appropriate for a more in depth review of strategy – generally, but not always, at around every five years.

6. Spread the load and delegate



Policies and agreements have a limited life-span before they have to be reviewed – those required for Accreditation tend to work on a five year period. It can be hard to remember when the review date is due and a challenge to give the review enough time to be anything more than a rubber stamp, particularly if the policies were all developed for Accreditation and so are up for review at the same time.

Keep a schedule of all your policies, agreements and expert reviews, noting the date they were signed off and the date for the review. Build in time to consult stakeholders, check out whether the document works, is still relevant and reflects current circumstances. In the case of expert reviews (security and access), you'll need to build in time to commission the review and receive the report.

Five years is generally a maximum period before a review must be carried out. Consider doing some earlier and so spread the load over a longer period of time.

In addition, now that the dust has settled, why not delegate the responsibility for providing evidence of compliance with the Accreditation standard to others? Perhaps, for example, a member of the front of house team can take on the requirements for sections 3.1 and 3.2, and a volunteer who delivers the learning sessions can take responsibility for ensuring everything is in place for requirement 3.3.2?

A full list of policies, agreements, reviews, plans, etc. required for Accreditation is in Appendix 1.

7. Keep up the conversation

Knowing who your users and non-users are and what they want is key to running a successful museum. Nurture the links you made and the procedures you developed when applying for Accreditation to gather ideas and evidence to inform your programmes and advocate your cause. For example:

- Consult on proposals
- Evaluate exhibitions
- Gather user data from your website/social media as well as from visitors to the museum
- Run an annual non-user consultation at a local library or supermarket, in a newspaper, via a website
- Create an advisory panel of local societies/businesses, etc.
- Join the local trade or tourism association

Analyse this data regularly and use it!

Conversations are two way, so tell your users what you are doing, what's important to you, how you operate. For example:

- Have a section on your website where you put your policies and outline plans
- Put faces to the roles at the museum, rather than just a 'contact us' option
- Keep your website up to date and use social media to generate lively debate and interaction
- Create editorial for the local press

8. Stay in touch with your Museum Mentor

ACE estimates a Museum Mentor spends about four days a year supporting the museum they mentor. This can be by email, phone or in person at the museum. They must receive all the papers for meetings of the Governing Body and attend at least one Board meeting a year, plus make a site visit. They are also required to conduct an annual review of the museum's operation, guided by the Forward Plan, and write a report for submission to ACE with the Accreditation Triennial Return. The museum's relationship with the Mentor is governed by a formal signed agreement and guidelines set out in the [Museum Mentor Handbook](#).

Your mentor is a really useful source of information and support – a cross between a critical friend, an encyclopaedia and a gateway to other sources of help. Use the annual review, not only to look back over the past year, but also to:

- Look forward to the next one
- Identify where support may be necessary and how it can best be provided
- Schedule meetings
- Review the Museum Mentor agreement to remind both parties of their obligations

9. Stay networked

Learning from others, tackling challenges together and realising you are not alone all help museums thrive. If you are struggling with some aspect of Accreditation, you can guarantee someone has been there before and there's advice out there to help you through. Make use of this resource. For example:

- Attend meetings of your County Museum Group
- Keep in touch with your local Museum Development Officer and other professional help
- Attend the South West Museum Skills training programme and other training workshops
- Sign up to e-newsletters from the [South West Museum Development Programme](#) and the [South West Federation of Museums & Art Galleries](#) (SW Fed), follow them on Twitter and like their Facebook pages
- Use the resources available on the SWMDP, SW Fed, [Collections Trust](#) and [Association of Independent Museums](#) () websites.

10. Remember your museum's Statement of Purpose

Whether it is called a Mission Statement or Statement of Purpose, is a snappy strapline or couched in the legalese of a charitable constitution, this statement encapsulates why your museum exists, what it does and for whom.

It should underpin all of the museum's activities, be familiar to everyone associated with the museum – governing body, staff, volunteers, friends – and figure prominently on the museum website and promotional literature. It should head up every policy, plan and procedure because these documents have been created in order to deliver its objectives.



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**Bristol
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It is the museum's most important statement, there to inspire and remind.



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www.southwestmuseums.org.uk