



# Congratulations, your museum is Accredited!

## Use these Top Tips to capitalise on all of your hard work

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. Follow these 10 tips to make it work for you and be ready for your museum's 5-yearly Review.

### 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 together the information required for the 5-yearly Review 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
- Your Accreditation 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/Business Plan (in particular the action plan and progress with tackling Areas for Development)
- Accounts

### 2 Tackle Areas for Development



The letter from Arts Council England notifying your museum of the outcome of its application for Accreditation may have highlighted 'Areas for Development' that the Accreditation Panel would like you to address. You will have to report progress in tackling these when you submit your 5-yearly 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/Business 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/Business Plan.

### 3 Share the knowledge



Make sure staff and volunteers who are responsible for an area of work are familiar with the policies 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 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 Monitor progress



Have the Forward Plan/Business 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 improvement plan if it is not included in the Forward Plan/Business Plan and any other development/improvement plans.

## 5 Use the Forward Plan/Business Plan



Forward Plans/Business 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.

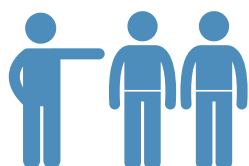
Three years is the recommended timeframe for a Forward Plan/Business Plan, with Year 1 worked up in detail, Year 2 slightly less so and Year 3 sketchier again. By the fourth quarter of Year 1, the detail of Year 2 can be firmed up and that of Year 3 plotted more closely.

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 museum's internal and external operating environment and consult. Doing this regularly as suggested in tip 4 means that drawing up a Forward Plan/Business Plan need 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, 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 review. Build in time to consult stakeholders, check whether the document works, is still relevant and that it reflects current circumstances. In the case of the security review, you'll need to build in time to commission the review and receive the report if you do not have an internal specialist.

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

In addition, now that the dust has settled, consider delegating 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 aspects of the requirements for sections 8.1 and a volunteer who delivers the learning sessions can take responsibility for ensuring aspects of requirement 9.1 are in place.

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, or 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 and 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 Accreditation Mentor



Arts Council England estimates an Accreditation 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/Business Plan, and write a report for submission to Arts Council England with the Accreditation 5-yearly Return. The museum's relationship with the Mentor is governed by a formal signed agreement and guidelines set out in the Accreditation Mentor Handbook, available on the Arts Council England website.

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 Accreditation 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 follow them on Twitter
- Use the resources available on the South West Museum Development Programme, 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.

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

## Appendix 1

### Policies, Plan, Procedures, Agreements, Assessments and Charts required for Accreditation

Those marked with an asterisk (\*) are mandatory  
Those plans marked with # may be included in the Forward Plan/Business Plan

Statement of purpose \* (1.1)

A constitution \* (1.2)

Two years accounts or similar documentation \* (2.2)

#### Policies

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- Collections Development \* (4.2)
- Documentation \* (5.1)
- Collections Care & Conservation \* (6.1)
- Access \*(7.1)
- Learning (9.1)
- Interpretation (9.1)
- Research (9.1)

#### Plans

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- Succession planning for Governing Body (1.3)
- Forward Plan/Business Plan, including action plan and resource plan (finance & workforce)\* (2.1)
- Emergency Plan \* (3.3)
- Documentation plan \*# (5.2)
- Collections Care & Conservation \*# (6.2)
- Access Plan\*# (7.2)
- Audience development\*# (8.3)

#### Procedures

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- Evidence of delegated responsibility \* (where key decisions have been devolved to an individual or a committee of the governing body) (1.3)
- Committee terms of reference \* (where key decisions have been devolved to a committee of the governing body) (1.3)
- Induction – Governing Body, staff, volunteers \* (1.3)
- Succession planning procedures\* (1.3)
- Documentation Procedural manual \*(2.7)
- Consultation with users and non-users\* (8.1)
- Evaluation\* (8.2)

*This resource was conceived and written by Vicky Dawson, SW Accreditation Technical Adviser 2019*

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## Agreements

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Management agreement \* (museums where a body has been contracted to manage the museum) (1.3)

Lease/licence for museum premises \* (museums that do not own their own premises) (3.1)

Volunteering agreement \* (1.3)

Accreditation Mentor \* (museums without a suitably qualified member of staff) (1.3)

## Charts

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Management chart (1.3)

Workforce chart \* (1.3)

## Assessments

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Access audit/assessment \* (7.1)

Security review \* (3.2)

## Legislative & ethical framework

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Health & Safety legislation

Equalities legislation

Employment legislation

Environmental legislation

Charity law

Financial reporting and accounting law

Museums Association Code of Ethics (2016)

**south west**

**museum  
development  
programme**



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