

# Resource: Accreditation 2018: Policies, Plans and Evidence

This resource was created by our Technical Accreditation Adviser, Vicky Dawson, to assist with what documents, policies, plans and evidence you need in your Accreditation application or return.

**Items marked with an \* must be submitted with your Application Application/Return.**

**All other plans must be available to show to the assessor if your museum is selected for a verification visit (all new applicants, 10% of returning applicants).**

## Required document

- Constitution\* (new applicants only: document submitted with the Eligibility Questionnaire; returning museums: if the constitution has changed since your last Return)

## Required policies

- Collections Development Policy\*
- Collections Documentation Policy\*
- Collections Care and Conservation Policy\*
- Access Policy\*

## Required plans

- Organogram showing the management and workforce structure of your museum\*
- Forward/Business Plan\*
- Security Improvement Plan (may be a stand-alone document or part of your Forward Plan)
- Emergency Plan
- Documentation Procedural Manual
- Plan to complete Inventory (SPECTRUM Standard 4) if not completed (may be a stand-alone document or part of your Forward Plan)\*
- Documentation Improvement Plan (SPECTRUM Standard: Documentation Planning)
- Collections Care Maintenance and Improvement Plan (may be a stand-alone document or part of your Forward Plan)
- Plan to improve the physical, sensory and intellectual access to your collections and buildings (may be a stand-alone document or part of your Forward Plan)
- Audience Development and Diversification plan (may be a stand-alone document or part of your Forward Plan)\*

## Required report

- Accreditation Mentor report (museums with mentors only)\*

**Top tips:** We are here to support you at every stage of the Accreditation process.

Please [contact us](#) using the Accreditation drop down and the best person to answer your question will be in touch.

We have dedicated local area [Museum Development Officers](#) to provide advice and connect you to wider networks. Vicky Dawson is our Technical Accreditation Adviser dedicated to supporting museums with Accreditation.

## Required assessments

- Security risk assessment and plan for implementation
- Access assessment
- User and non-user assessment

## Required minutes/evidence

- Qualifications of museum professional who advises the governing body (evidence)
- Confirmation of authority to approve policies and plans (evidence)\*
- Signed Accreditation Mentor agreement (evidence)\*
- Confirmation of the appointment of your Mentor (signed minute)\*
- Management agreement/service level agreement (museums run by a separate organization to the governing body – signed agreement)\*
- Volunteer agreement\*
- Approval of Statement of Purpose (Vision) and Key Aims by the Governing Body (signed minute)\*
- Signed accounts for last 2 financial years (evidence)\*
- Signed lease/tenancy agreement (Museums that do not own their building – evidence)
- Key loan agreements (Museums where more than 50% of their collection comes from one or more major loans)\*
- Confirmation of approval of the Collections Development Policy (signed minute)\*
- Confirmation of approval of the Collections Documentation Policy (signed minute)\*
- Confirmation of approval of the Collections Care and Conservation Policy (signed minute)\*
- Confirmation of approval of the Access Policy (signed minute)\*

## Optional but recommended policies

- Finance policy
- Reserves policy
- Induction policy for governing body and workforce
- Governing Body and workforce development policy
- Volunteer recruitment, induction and development policy
- Equalities policy
- Interpretation policy
- Learning policy
- Health & Safety policy

## Optional but recommended plans

- Succession plan
- Communications plan (including digital media)

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