

Guidelines for a successful annual review for museums and their Accreditation Mentors

This resource from our Accreditation Technical Adviser, Vicky Dawson, provides advice to Accreditation Mentors, setting out the context of the annual Accreditation review between a museum and its Accreditation Mentor. It will provide guidance on how to conduct a successful review. It is written for Accreditation Mentors and museums.

Purpose of the annual review

The purpose of the annual Accreditation review is twofold:

1. To review the museum's progress against agreed objectives over the past year
2. To identify areas of work in the coming year where the museum would benefit from their Mentor's support

The review is part of the framework within which the Mentor/museum relationship functions. Other parts of this framework are:

- The written Museum/Accreditation Mentor agreement
- The Mentor's attendance at a meeting of the governing body and receiving the papers for all the meetings of the governing body (agendas, reports, accounts, minutes) throughout the year
- At least one visit by the Mentor to the museum a year
- The Mentor's report that is submitted with the museum's quinquennial Accreditation return/application for Accreditation.
- Email and phone contact throughout the year

The success of the review depends on both parties establishing a good relationship which is itself founded on their clear understanding of their own and each other's roles and responsibilities within the mentor/museum relationship. The foundation of this is the written Museum/Accreditation agreement.

Why conduct an annual review?

The review is a requirement of the Accreditation scheme. Though it is an internal process between the museum and the Mentor, cumulatively the annual reviews will inform the report the Mentor has to submit with the museum's quinquennial review.

Ideally it is an informal yet structured opportunity that gives both the museum and the Mentor the chance to reflect on successes and failures and to discuss challenges and future plans. The Mentor is the museum's critical friend, so the review should be a supportive and positive experience, whilst not glossing over what has not gone so well.

Top tips:

- Ensure the meeting is regarded and run as a meeting of equals.
- Participants need to be open, honest, positive, professional, respectful, and listen and act in confidence.
- Hold the meeting in a comfortable space, where participants will not be interrupted.
- Celebrate successes as well as acknowledging challenges.
- Adopt a solution focused approach to challenges.
- Record all agreements and actions in the final report of the meeting.

Who should be involved?

The review should involve the Mentor and their key contact(s) within the museum's strategic and operational teams. This may be one and the same person or two or more people depending on how the museum is organized.

When should the review take place?

The review should be held towards the end of the museum's financial/planning year so that it coincides with the museum's own review mechanisms, has access to facts and figures about performance and is in time to input into the museum's planning for the coming year.



What format should a review take?

- The museum's **forward/business plan and its accompanying action plan** are a good starting point for the review. An up-to-date budget report and cash flow forecast are also useful. Depending on timing, the draft annual report of Trustees might be available. The report from the previous year's Accreditation Mentor/museum review could also provide a benchmark for development.
- The meeting should **check progress against planned objectives** as set out in the forward plan and discuss in more detail any issues arising, lessons to be learnt, unexpected achievements and challenges. This gives the Mentor the opportunity to give praise and to draw out any underlying factors that may be impacting on the museum's performance.
- The meeting can then look at the **activity planned for the coming year**, check that this is still relevant and on track, discuss any areas where the museum might need additional support and signpost them to where they can secure it.
- The meeting might then go on to **discuss any themes** that have emerged during these discussions or any issues that have not yet presented themselves. Be sure to check in on the softer or often less tangible side of operating a museum, for example volunteer/staff wellbeing, communications, governance.
- The meeting should also **review the Museum/Accreditation Mentor relationship** over the past year and consider what the focus of it should be in the coming year. Is the match still meeting the needs of both parties? Can improvements be made to its effectiveness? Might a mentor with different skills or knowledge be more appropriate for the museum if it is moving into a new phase of development? Can the mentor still devote the time needed to the job? There is no shame in either party wishing to end the agreement.

How should difficult issues be handled?

The Museum/Accreditation Mentor relationship is one of trust and support – the Mentor is there to help the museum. The review meeting is held in confidence and both parties can make it clear when they want particular issues kept within the room.

Ideally, if matters of such a sensitive nature do come out at the meeting, the Mentor can help the museum identify ways to address them and move forward. This may include accessing additional support from specialists. South West Museum Development staff can be called on to provide skilled support in many areas including workforce management, governance, financial matters and organisational change.

What if a critical issue arises or no agreement can be reached on a serious breach of the Accreditation Standard or even the law?

If no consensus or acknowledgement can be achieved through discussion, then either party can request:

- Time to reflect and research further information about the topic in order to come to a solution.
- The advice or involvement of a third party – the museum's Museum Development Officer (MDO), the South West Museum Development Accreditation team or the Accreditation Manager at Arts Council England – depending on the nature of the concern.

It is always best to express your concerns and notify the museum/Mentor that you intend to do this and that you will do so in confidence.

What happens after the review?

It is helpful for the museum if the Mentor writes a short report of the review meeting, summarizing points discussed, actions agreed and decisions taken. Send a draft of the report to the other people who took part in the review for comment before finalising it and sending a final copy to them and to the chair of the Governing Body (if they were not part of the meeting). With the museum's permission, a copy could be usefully sent to the museum's MDO too.

The Mentor should use their discretion about the recording of the discussions of sensitive issues. Copies of the report can be redacted if necessary, so long as one complete record remains on file.

Contacts

Museum Development Officers (MDO) in the South West - [Find your local MDO via our website](#)
 South West Museum Development Accreditation team - museum.accreditation@bristol.gov.uk
 Accreditation Manager at Arts Council England - accreditation@artscouncil.org.uk

Further information

- [South West Museum Development Accreditation resources](#)
- Arts Council England [advice for Mentors](#), including Museum Mentor Handbook (2011), handy templates and the Accreditation Standard.

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