

This resource from our Technical Accreditation Adviser, Vicky Dawson, sets out what museum can expect from their Accreditation Mentor and how to make the most of the expertise they bring.

Accreditation provides museums of all sizes with a framework to help them manage every aspect of their operation. All encompassing, it can seem daunting. Your Accreditation Mentor is there to help you navigate the Accreditation Standard. At its best, the museum/mentor relationship is creative, supportive and mutually beneficial.

This resource is divided into two parts - the first sets out the framework within which the relationship sits, and second suggests ways to get the best out of the relationship

1. The framework

1.1 What is the purpose of having an Accreditation Mentor?

The Accreditation Standard requires museum governing bodies to have access to professional museum advice to help them make informed decisions about professional matters.

In smaller museums who do not employ a museum professional this advice is provided by the Accreditation Mentor.



1.2 What does an Accreditation Mentor do?

The mentor is often regarded as a critical friend to the museum: there to provide advice and an opinion on issues under discussion, to suggest a course of action or to signpost to a source of support or ideas. As well as providing telephone and email support, they are required to:

- Attend at least one meeting of the governing body during the year
- Receive all the papers for every governing body meeting (including financial reports)
- Visit the museum at least once during the year
- Conduct an annual review with a trustee and senior manager at the museum
- Write a report to accompany the museum's Accreditation Return to Arts Council England

Top tips: Further reading

- Arts Council England [Accreditation Mentoring Handbook and templates](#)
- Our Accreditation [resources archive](#)

Questions?

Contact our Accreditation Team museum.accreditation@bristol.gov.uk

1.3 Who can be an Accreditation Mentor?

Anyone who meets this definition of a museum professional:

- At least three years working in museums, with experience at curatorial/managerial level. This experience can be across any of the three areas within the standard: organisational health, managing collections, or users and their experiences
- A commitment to personal learning and development to show how they are keeping their knowledge, skills and experience up to date

Professionals who wish to be Mentors have to apply to Arts Council England to confirm they are eligible to do the job, so you can be sure that they meet the necessary specification.

1.4 How do I find an Accreditation Mentor?

Finding a Mentor is like finding any new member of the workforce:

- Draw up a role description and list the key areas of experience you would like your mentor to have. Give a brief description of your museum (collections, governance and management structure, size) and outline the plans you have for the next couple of years. Ask potential candidates to apply by letter and CV.
- Get in touch with the Accreditation team at South West Museum Development (museum.accreditation@bristol.gov.uk) to ask whether they have anyone suitable on their books and to request the vacancy be posted in their monthly newsletter.
- Circulate the vacancy in other places too: your County Museum network, neighbouring museums with professional staff, the SW Fed (info@swfed.org.uk), the [Leicester museum jobs desk](#), on your website and using your social media channels.
- Interview any applicants informally – a chat is generally sufficient - to see if you are likely to get on and to check that both parties understand the scope of the role.

1.5 How do we formalise the arrangement?

It is important to draw up and sign a formal agreement between your museum and your Accreditation Mentor. We have created a template found on [our resources page](#) to get you started. The agreement sets out the responsibilities of both parties within the relationship. The agreement should be reviewed annually, at the same time as the Mentor meets the museum management for the annual Accreditation review.

1.6 Is an Accreditation Mentor paid?

It is generally an unpaid role, though the museum can offer to pay an honorarium or travel expenses if they feel that they are asking over and above what can reasonably be expected of their mentor. It is important to set any special terms down in the museum/mentor agreement. In the case of an honorarium it is important to be aware of any impact this might have on the mentor's tax position.

1.7 Can the Mentor be a member of the Governing Body?

Yes, they can serve on the museum's governing body as a voting member. In these circumstances their appointment has to follow the procedure set out in the museum's governing document.

2. Tips on getting the best out of the relationship with your mentor

2.1 Take time to consider the skills and experience you are looking for in a mentor.

Perhaps the museum is embarking on a major collections management project, broadening its audience engagement, or preparing a funding bid and ideally you would like to appoint someone with expertise in these areas. You can state your preferences in your recruitment advert.

2.2 Induct your mentor as you would any member of your workforce

- Make sure they have copies of all the important documents – Forward/Business plan and action plan, the annual budget, minutes of the last meeting of the governing body, names of Trustees and of key personnel at the museum, an organisational chart.
- Take them on a tour of the museum and introduce them to the rest of the workforce. Give them the lowdown on the collections, premises and documentation system.
- It is important that everyone involved at the museum knows who their mentor is and their role at the museum. Consider profiling them in your newsletter and/or on your website. Invite them to events and social occasions as well as to the required formal meetings.

2.3 Make the most of the annual museum/mentor review

- This is an excellent opportunity to look back over the previous year, to take stock of what has worked well and where improvements could be made, to celebrate achievements and to look forward to the coming year to identify times when you might need additional support from your mentor.
- Allocate sufficient time for the review – a couple of hours minimum – to allow for informal chat and a review of the mentor/museum agreement too.
- Include key people in the review. Exactly who will depend on the management structure of your museum, but attendees could include the Chair of Trustees (or a delegated trustee), the most senior member of the museum's operational team, and anyone else whose role is particularly important in the past or the coming years.
- Use the Forward Plan and action plan as the basis for the review, to give structure to the discussion.
- Towards the end of the meeting pencil in dates in the coming year for the mentor's formal visit, the dates of the board meetings, the annual review and any other dates that you feel are important (volunteers tea, visioning exercise, summer fete, etc.) to help the mentor plan their year, enabling them to judge which meetings will be best to attend. It ensures dates are not missed and makes the mentor feel part of the museum.
- At the end of the review it is a good idea to write a note of the discussions and the ensuing actions that were agreed. Either party can agree to do this task and then share the report with the others.

2.4 Keep your mentor informed, even when things are going well

For a mentor to be able to offer advice when asked, they need to be kept abreast of what the museum is doing.

- Make sure that the secretary sends them all the papers for board meetings at least 7 days prior to the meeting, with the minutes of the meeting sent no longer than 2 weeks after the meeting.
- They might also request to have papers for sub-committees. Check their preferences on appointment and at the annual review.
- It is a good idea to invite your mentor to subscribe to your mailing list/newsletter.
- If you haven't been in touch for a couple of months a quick email or telephone call can really help to maintain the contact.

2.5 Involve your mentor in the Forward Planning process

The Plan and its accompanying action and resource plans are the framework which direct the museum's operations over the course of a year. They will form the basis of the annual mentor review.

It is important that the mentor has a copy of the plan and is kept up to date with progress through the reports to/minutes of the board meetings. Your mentor should be invited to contribute to any forward planning exercise undertaken when drawing up a new plan. They will offer an external and professional perspective to your discussions.



2.6 Treat the relationship as one of equals and of mutual support

- The Mentor is giving the museum their time and expertise for free, often in their own time, and so should be listened to and treated with respect. Remember they are there to advise the museum on how to meet or exceed the Accreditation standards and have the best interests of the collections you care for and the successful operation of the museum at heart. Often a person has chosen to mentor for the breadth of experience the opportunity of working with another museum gives them: they are learning too.
- For your part you and your colleagues at the museum are devoting your time and passion to an organisation to which you are very attached and with which you are very familiar. You can expect to be treated with respect too.
- This does not mean that robust discussion and differences of opinion should not occur. If they do it must be possible to agree to differ without any hard feelings or to get a second opinion if necessary (see tip 2.9 on managing disagreements below).

2.7 Be reasonable about the demands you make on your mentor

The Accreditation Guidance (2019) sets out the duties of a mentor within the scheme (see 1.2 above). In reality these are often just the minimum contact the mentor will have with their museum over the course of a year. Mentors will recognise that there are times you may need additional support and will generally give it to you freely or know where else you can secure it. In turn you should be sensitive to the pressures they are under at work.

2.8 Tackle any disagreements or bad feelings before they escalate

- Known flashpoints between mentor and museum include:
 - The mentor not staying in touch
 - The mentor being unrealistic in their expectations of the museum
 - Personality clashes between the mentor and their main contact at the museum
 - The mentor's perceived lack of experience
 - The museum not sending out board papers to the mentor
 - Difficulty for the mentor to access the governing body
 - The museum consistently not following the mentor's advice
- The simplest way to tackle a disagreement is to not let it arise in the first place. Follow the recommended recruitment process (see 1.4 and tip 2.1 above) and draw up and implement a museum/Accreditation Mentor agreement (see 1.5 and tip 2.2 above) and you will minimise the risk of any misunderstandings.
- If something does nevertheless crop up, the first solution should be to resolve the matter informally. Arrange a time to speak about it, preferably face to face, but otherwise on the phone, maybe preceded by an email setting out briefly the reason for your unease.
- Try and find out the reason for their behaviour and describe the impact their behaviour is having on the museum's/mentor's ability to do its/their work.

2.8 Continued.

- If this does not work you can choose to write more formally to the mentor, stating the reasons for the complaint/disagreement and the options for resolution as you perceive them. Invite them to respond and emphasize your desire to reach a solution.
- You should consider the option of seeking a second opinion or the input of a third party to moderate the discussions and broker an agreement. South West Museum Development provides specialist advice in most aspects of running a museum – workforce management, collections care, governance, business planning, audiences and digital engagement. Your Museum Development Officer is also an impartial source of support.
- If none of these interventions resolve the matter, then the situation may be irretrievable and the only solution is to end the relationship, following the procedure set out in the museum/Accreditation Mentor agreement. Remember your museum will have to recruit a new mentor and go through all the processes involved again.
- All grievances should be treated in confidence by both parties.
- One of the most common sources for disagreement between museum and mentor is when the museum does not follow the advice recommended by the mentor, especially when not to do so will put collections or other assets at risk, be counter to museum ethics, illegal or not meet the Accreditation Standard.
- Unless you have very good reason not to do so and can explain those reasons to your mentor and can take full responsibility for the likely outcomes of your action, then it is advisable to follow your mentor's advice.
- It is important to remember your mentor is there to share their skills and experience on matters in which they are professionally qualified. They are bound by the Museums Association Code of Ethics and operate to uphold the Accreditation Standard.
- If they judge that your museum is wilfully not following the Standard and putting collections at risk then they will report that to Arts Council England in their next Accreditation Report. If the museum's date to submit a return is more than a year away, then they have a duty to report the breach earlier.
- Clearly it is best to resolve this issue before it gets to this stage, initially by discussion between the mentor and the museum, escalating it to trustees if necessary. Failing this, the input of a 3rd party as described above should be used. It is in no one's interest to prolong feelings of distrust and acrimony.

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