



**MUSEUM**  
ACCREDITATION

---

Supporting Guidance for Accreditation  
Standard November 2018

# Accreditation Guidance

March 2019

# Contents

## Getting Started

Introduction .....	3
--------------------	---

---

How to apply: a step by step guide for first time applicants .....	4
--	---

---

<b>Step 1</b> Check if your museum is eligible for Accreditation .....	6
--	---

- What questions to expect .....
  - Are you ready to complete your eligibility questionnaire? .....
  - Submitting your eligibility questionnaire .....
  - Assessment .....
  - Working Towards Accreditation .....
  - If you're not eligible .....
- 

<b>Step 2</b> Decide on the size and type of your museum .....	11
--	----

- Independent museum indicators .....
  - Local authority museum indicators .....
  - University museum indicators .....
  - National museums .....
  - Nationally-styled museums .....
- 

<b>Step 3</b> Make your Accreditation application .....	16
---	----

- Completing the application form .....
  - Multi-site services .....
  - National museum authorities .....
  - Evidence of approval .....
  - Getting help .....
- 

## Organisational Health

<b>Guidance notes for Accreditation Standard requirements 1-3</b>	
---	--

Organisational Health .....	20
-----------------------------	----

---

## Managing Collections

<b>Guidance notes for Accreditation Standard requirements 4-6</b>	
---	--

Managing Collections .....	42
----------------------------	----

---

## Users and their Experiences

<b>Guidance notes for Accreditation Standard requirements 7-9</b>	
---	--

Users and their Experiences .....	60
-----------------------------------	----

---

## Next Steps

<b>How your application is assessed</b> ..	79
--	----

- New applicants .....
- Accreditation returns .....
- Returns deadlines .....

The assessment process .....	80
------------------------------	----

What types of assessment are there? .....	81
---	----

Who makes the award decision? .....	82
-------------------------------------	----

What are the possible decisions that panels can make? .....	82
---	----

How long does it take? .....	85
------------------------------	----

Your award letter .....	85
-------------------------	----

How long does the award last? .....	85
-------------------------------------	----

Promoting your award .....	86
----------------------------	----

What to do if you're experiencing significant change .....	86
--	----

Financially-motivated disposals .....	87
---------------------------------------	----

Hosted museums .....	87
----------------------	----

What to do if you no longer wish to participate .....	87
---	----

Terms and conditions .....	88
----------------------------	----

Feedback and complaints .....	88
-------------------------------	----

Freedom of information and data protection .....	89
--	----

Review .....	89
--------------	----

---

## Introduction

The Accreditation Scheme is the UK industry standard for museums and galleries.

It helps everyone involved with a museum to do the right things, helping people to access and engage with collections, and protect them for future generations.

The Accreditation Scheme does this by making sure museums manage their collections properly, engage with visitors, and are governed appropriately by encouraging all museums and galleries to meet an agreed standard in:

- How they're run
- How they manage their collections
- How they engage with their users

The Accreditation Scheme is run for museums and galleries of all sizes and types across the UK. It is managed as a UK Partnership between Arts Council England, the Welsh Government, Museums Galleries Scotland and the Northern Ireland Museums Council. Our shared commitment and UK reach gives Accreditation greater impact and cohesion. The scheme has led the way in raising museum standards in the UK and has been used as a model and source of inspiration for similar schemes overseas.

The guidance notes that follow will provide practical information on how to complete the Accreditation form, whether you're applying for the first time or making an Accreditation return. It will provide links to support and advice to help you, and information on how we'll assess your museum against the Accreditation Standard.

# How to apply: a step by step guide for first time applicants

There are three steps to completing an application for Accreditation if your museum is not already participating in the Scheme.

If you are a new applicant, you will need to:

### Step 1

#### Check if your museum is eligible for Accreditation

*See pages 6-10*

Eligibility questionnaires are reviewed by Arts Council England in consultation with Museum Development providers in England, the Welsh Government, Museums Galleries Scotland and Northern Ireland Museums Council for museums in each respective country.

You'll need to complete the eligibility questionnaire (available to download from the website of your assessing organisation) and return it with the relevant documents to:

### England

Arts Council England



<https://www.artscouncil.org.uk/supporting-arts-museums-and-libraries/museums-accreditation-scheme>

### The Isle of Man and Channel Islands

Arts Council England



<https://www.artscouncil.org.uk/supporting-arts-museums-and-libraries/museums-accreditation-scheme>

### Northern Ireland

Northern Ireland  
Museums Council



<https://www.nimc.co.uk/>

### Scotland

Museums Galleries Scotland



<https://www.museumsgalleriesScotland.org.uk/>

### Wales

The Welsh Government



Llywodraeth Cymru  
Welsh Government

<https://gov.wales/topics/culture-tourism-sport/museums-archives-libraries/?lang=en>

If your museum has been confirmed in writing as eligible to apply for Accreditation, you can then move on to the rest of the Accreditation Standard requirements:

## Step 2

### Decide on the size and type of your museum

The Accreditation Scheme is run for museums of all sizes and types: from the smallest volunteer-run museums to national museums, but it's not 'one size fits all'. To ensure that we assess your application according to your museum's size and type you first need to compare your museum against the size and type indicators.

*See pages 11 to 15 for guidance notes on size and type.*

## Step 3

### Make your application

Once you've decided on your size and type, you'll need to read the relevant notes for each section of the standard, so that you know what evidence you need to gather to make your application for Accreditation.

*See pages 20 to 41 for guidance notes on the Accreditation Standard requirements 1-3 – Organisational Health.*

*See pages 42 to 59 for guidance notes on the Accreditation Standard requirements 4-6 – Managing Collections.*

*See pages 60 to 78 for guidance notes on the Accreditation Standard requirements 7-9 – Users and their Experiences.*

Complete the online application form attaching all relevant required documentation. The online application portal is hosted by Arts Council England on behalf of the UK Accreditation Partners and you'll find links to the new application form, guidance on how to get started and technical advice on the Arts Council website.

# Step 1 Check if your museum is eligible for Accreditation

## What questions to expect

To be eligible to apply to the Accreditation Scheme you must be able to answer 'yes' to questions 1-6.

The following types of organisations will not normally be considered eligible:

- Privately owned museums and historic houses
- Commercial galleries
- Science centres
- Natural and archaeological sites, historical and industrial buildings, sites, monuments and heritage centres without associated long-term collections
- Institutions displaying live specimens, for example zoos and botanical gardens
- Educational loan services
- Venues for temporary exhibitions without long-term collections on display
- Record centres
- Libraries and archives including sound, film and photographic archives
- Virtual museums

Accreditation is awarded to individual museum venues (a physical site/space/building) rather than to collections or services.

To apply for the Scheme for the first time or re-apply after a period of non-participation, your organisation must meet the following criteria:

## Q1 Is the museum based in the UK, Isle of Man or Channel Islands?

We will ask for the address and contact details of your organisation, so we're able to contact you regarding your application and to check the museum is eligible to participate in the scheme based on its location.

## Q2 Does it meet the agreed definition of a museum?

*'Museums enable people to explore collections for inspiration, learning and enjoyment. They are institutions that collect, safeguard and make accessible artefacts and specimens, which they hold in trust for society.'*

You'll be asked to confirm that your museum meets the Museums Association definition (1998).

## Q3 Is the museum a physical site/space/building which is open to the public regularly?

You'll be asked for the name and address of your museum, opening hours and website (if you have one).

## Q4 Are the public able to see and engage with the museum's collections?

This section is for you to expand on your answer to question two – to outline how your organisation fulfils its public purpose.

## Q5 Does the museum have an appropriate constitution?

You'll be asked for the name of your governing body. The operating name and the constitutional name of the museum may not be the same. The name provided for the governing body should be the same as that on the governing document.

A museum needs to be governed by a legal document which gives it appropriate powers and which minimises the risk to the collections long-term. This is known as its constitution or governing document.

The museum must be a long-term organisation that exists to benefit the public and protect its assets, including collections. There are five constitutional requirements for your museums' governing body:

1. Exists for public benefit
2. Can demonstrate its collections and assets are appropriately protected
3. Has powers to operate a museum and hold collections and assets. These powers must be transparent and should not include the ability to distribute assets or profiles for private gain
4. Is subject to statutory regulation or judicial process in relation to its conduct
5. Must be a permanent entity with a long-term purpose

You'll need to show that your constitution meets these criteria. You'll also need to indicate whether your governing body operates the museum directly or has contracted a legally separate management organisation to do so.

### What type of constitution does your organisation have?

Your museum must have an appropriate and acceptable constitutional structure and documentation for its governing body. You'll need to send a copy of your approved governing document with your completed questionnaire.

It's important to know what type your museum has. You'll be asked to select your governance type.

### Definition – governing document

The governing document refers to a legal document setting out an organisation's aims and, usually, how it is administered. It may be a trust deed, constitution, rules, memorandum and articles of association, conveyance, will, Royal Charter, scheme of the Charity Commission or other formal document.

### Independent museums

The independent museums sector covers a range of organisations with various governance arrangements, but all need to have a constitution that gives them the power to hold and/or own a collection and operate a museum.

All will be regulated by one (or more) of the following bodies:

- Charity Commission
- Companies House (for a Charitable Company Limited by Guarantee)
- Financial Conduct Authority
- Office of the Regulator of Community Interest Companies
- Office of the Scottish Charity Regulator (OSCR)
- Charity Commission for Northern Ireland

Independent museums can be set up in a variety of forms including a Trust, a Charitable Incorporated Organisation – foundation and association (England and Wales), tier one and tier two (Scotland), or a Charitable Company Limited by Guarantee.

Where a local authority has transferred its museum provision to an independent entity, the governing body will often be viewed as the group overseeing the independent entity. In this instance copies of the agreements for this arrangement will need to be provided. This might include documents such as a management or service level agreement, or a collections loan



agreement. We'll use these to make sure the right governance document has been provided.

In some instances, the running of a museum may not be the main purpose of an organisation, such as the City of London Police. In this case the governing body will need evidence a resolution confirming that it has the powers to hold and/or own a collection and operate a museum for long-term public benefit. You'll need to provide this with your governance documentation.

## Local authorities

Local authorities are deemed to have the power to operate museums through the relevant Act of Parliament or Order (Northern Ireland) listed:

- England & Wales: Public Libraries and Museums Act 1964; Local Government Act 1972
- Scotland: Public Libraries Consolidation (Scotland) Act 1887
- Northern Ireland: The Museums and Galleries (Northern Ireland) Order 1998

Local authorities may also have powers to operate museums through an appropriate Local Authority Act.

Local authorities need to know the constitutional arrangements for the museums they manage, whether through the relevant Act, or where museum provision has been granted through a local Act, or where the authority acts as a sole trustee to a charitably constituted museum. In the case of town, community (Wales) or parish councils the principal authority would need to pass a resolution that delegates its authority under the relevant Act. Whatever the constitutional arrangements are for the museums that a local authority manages, we will need to see this. This might be given as a copy of the museum's constitution, or reference to the relevant Act of Parliament, Order, or Local Authority Act.

In some cases, museums may be charitably constituted, and the local authority acts as its sole trustee. In this case we would need to see the legal agreement by the local authority which empowers the charitable trust to run the museum.

There can be other hybrid governance forms in place, for example where local authorities retain ownership of museum buildings and collections but outsource their management. Where a local authority has outsourced the operation of the museum to a third party for a set fee, and retains sign off for policy decisions, the governing body remains the local authority. Sometimes these arrangements can be more complex for example where a legally separate managing organisation is responsible for some aspects of the museum, with freedom over strategic direction and business planning, but not collections ownership or development. So we can understand your arrangements, you'll need to provide copies of any agreements between the local authority and the managing organisation. This might include documents such as a management or service level agreement, or a collections loan agreement.

## Universities

Universities are deemed to have the power to operate museums. The governing document will typically be located within the relevant committee terms of reference or the terms of an endowment or bequest.

You'll need to provide a copy of your governing document.

We'll look at management arrangements separately as part of your main application. For example, your management structure, delegations and lines of authority from the governing body (typically the university council or university senate) that empowers the delegated body to manage the museum.



## National museums

National museums are governed by national legislation and directly receive central or devolved Government funding. They are usually governed by an Act of Parliament or Royal Charter and constituted as charities. The regulatory body may be the Parliament from which the Act originated, whether UK Parliament or devolved, rather than the Charities Commission or the Office of the Scottish Charity Regulator.

For national museums please provide a copy of your constitution.

## Nationally-styled museums

The requirement for nationally-styled museums will be based on the relevant constitutional types mentioned above.

---

## Q6 Are you committed to making a full application for Accreditation within three years?

You'll be asked to outline the timescale and process you anticipate for making your Accreditation application. You'll need to think about how you will plan your time to get everything ready. Do familiarise yourself with the Accreditation Standard and this guidance, so you can find out what's involved from the start. You'll need time to develop all the required policies and plans and have the relevant signed minutes in place, which can sometimes take longer than anticipated. The best way to show this is to provide us with a copy of your forward or business plan.

If you don't yet have a forward or business plan, you'll need to submit formal evidence of how you plan to make your application. For example, minutes from your governing body or management committee where you've discussed what you need to do for an Accreditation application. You'll be asked for your target date

for making an application. You may wish to discuss a target date with your local Museum Development provider or Accreditation Adviser. If eligibility is confirmed, you'll have up to three years to provide an application, so you can be realistic about how long you'll need.

## Are you ready to complete your eligibility questionnaire?

If your organisation doesn't yet meet the requirements for questions three and four, for example if your museum is not yet open or you're in the process of changing your governing document, you'll need to take advice from your local Museum Development provider or your Accreditation Adviser. See the contacts on **pages 18-19**.

If you're unsure of the details of your constitution, consider using the quick reference guide to museum constitutional requirements as a handy checklist. This is published on the Arts Council's website. This may help identify if you need to make any amendments to your constitution before applying for eligibility.

We can't offer legal advice, but you may wish to consult a suitably-qualified legal adviser to take your specific circumstances into account. We have published supporting guidance on *Museum Constitutional and Governance Arrangements* (written by Dawn Langley, Alchemy Research and Consultancy commissioned by Arts Council England on behalf of the UK Accreditation Partnership, November 2018). This is available from your Museum Development provider, Accreditation Adviser or assessing organisation. You can find other governance resources signposted here:

Association of Independent Museums  
<https://www.aim-museums.co.uk/>

Collections Trust  
<https://collectionstrust.org.uk/accreditation/>

## Submitting your eligibility questionnaire

You need to submit the following documents along with the eligibility questionnaire:

- A copy of your museum's current governing documents
- A copy of your forward or business plan or alternative documents (such as a letter from trustees etc) demonstrating your commitment to making a full application for Accreditation within three years

These can be included as separate attachments or provided as a web link. You send these to your Accreditation assessing organisation by email (see page 4). Remember to sign your eligibility questionnaire too.

## Assessment

At this stage you'll have outlined your timescale for making an application for Accreditation. Completing the eligibility questionnaire isn't an application for Accredited status. It means your museum is requesting confirmation that you are eligible to apply.

From the information you've provided we'll decide whether your museum is eligible for Accreditation and if the museum can be confirmed as Working Towards Accreditation. If any additional information is needed, the reviewer will get in touch with you. You'll normally be informed of the outcome of the eligibility review within six weeks. If your review takes longer, we'll contact you. The outcome letter or email will include information on next steps.

If your museum uses or proposes to use a nationally-styled name, we'll usually want to arrange a site visit to talk about whether this matches up with public expectations of a national museum and is appropriate. This means your eligibility review may take longer than usual.

## Working Towards Accreditation

If your museum is eligible for Accreditation:

1. You'll be confirmed as Working Towards Accreditation which is valid for three years

from the date of your confirmation letter.

2. You'll be given a reference number to use on all communications with us. This number will begin with a 'T'.
3. You may be asked for an annual update on your progress towards a full Accreditation application, including any changes to policies, plans and/or target date.

Arts Council England publishes the names of museums considered to be Working Towards Accreditation on their website.

Your Working Towards Accreditation status only lasts for three years. If you don't make an Accreditation application within this time, we will have to re-assess your status.

Keep in touch with your Museum Development provider or Accreditation Adviser if you feel you're unable to complete your application in time or if you need additional support.

You may need to reapply for eligibility again if your governing body changes during the three-year Working Towards Accreditation period.

Ensuring that you've developed all the required policies and plans and have the relevant signed minutes in place to make your first application can sometimes take longer than you anticipate.

There's lots of guidance, training, resources and support available to you. See pages 18-19 for information on sources of advice and help to support your application for Accreditation. If you don't employ a paid museum professional and need support from an Accreditation Mentor, it's a good idea to look at this area early on.

## If you're not eligible

If we decide you're ineligible for Accreditation, we'll let you know why so you can understand what's needed and decide whether Accreditation is still for you. Our quick reference guide to museums constitutional requirements is a handy checklist if you're considering any changes to respond to eligibility feedback.

# Step 2 Decide on the size and type of your museum

In the guidance notes that follow we've colour coded the size and type of museums so that you know what evidence you'll need to provide for your museum.

**Independent museums – types 1-3**

**Local authority museums – types 1-3**

**University museums – types 1-3**

**National museums**

**Nationally-styled museums**

**All museums**

There are some elements in the standard that are applicable to all museums.

Use the indicators in the following tables to decide on your museum's size and type. This ensures that we can assess your application proportionately.

The indicators take into account the funding, visitor numbers, and services of different types of museums operating within the UK. They don't cover all aspects of what a museum does (for example, collection size has not been used).

Your museum doesn't need to meet each and every indicator on the scale; you may find you sit between two types. Simply use your best judgement to decide which set of indicators most closely matches your museum.

Your assessor will use the size and type indicators to guide their assessment of your museum. If we think another indicator is more appropriate we'll discuss this with you as part of the assessment and come to an agreement on which one to use as the basis for assessment.

## Independent museums indicators

	Type one	Type two	Type three
<b>Workforce</b>	operated entirely, or mostly, by volunteers, usually supported by an Accreditation Mentor	mostly volunteer workforce, with some paid staff, may be supported by an Accreditation Mentor	paid senior manager/s, paid and voluntary workforce
<b>Management</b>	managed directly by the trustees or through a delegated management committee	managed directly by the trustees or through a delegated management committee	managed by a paid director/manager reporting to the trustees or delegated committee
<b>Operating budget</b>	less than £30,000 per year	£30,000-£250,000 per year	over £250,000 per year
<b>Opening</b>	seasonal or weekend/special event opening or appointment only where appropriate (for example, prison or 'behind the wire' military museum)	seasonal, or open all year	open all year, or seasonal opening
<b>Learning offer</b>	relevant lectures/talks, learning groups welcomed on site	formal learning offer, subject specialist lectures/talks/events offered	formal learning offer to multiple educational and user groups, regular subject specialist lectures/talks/events
<b>Visitor numbers</b>	up to 10,000 site visits per year	up to 49,999 site visits per year	over 50,000 site visits per year

# Getting started

## Local authority museums indicators

	Type one	Type two	Type three
<b>Workforce</b>	paid professional curator/manager or equivalent, volunteer workforce	paid professional curator/ manager or equivalent, volunteer workforce	paid senior managers, professional managers including curators, learning experts
<b>Site</b>	a single site or one of several branch museums within a service	a single site or one of several branch museums within a service	a single site or one of several branch museums within a service
<b>Management</b>	managed by a paid museum professional	managed by a paid museum professional	managed by a paid museum professional
<b>Operating budget</b>	less than £100,000 per year	£100,000-£500,000 per year	over £500,000 per year
<b>Opening</b>	seasonal and/or weekend/special event opening	seasonal, or open all year	seasonal, or open all year
<b>Learning offer</b>	formal learning offer, subject specialist lectures/talks offered	formal learning offer to multiple educational and user groups, regular subject specialist lectures/talks	formal learning offer to multiple educational and user groups, regular subject specialist lectures/talks
<b>Visitor numbers</b>	up to 30,000 site visits per year	up to 99,999 site visits per year	over 100,000 site visits per year

# Getting started

## University museums indicators

	Type one	Type two	Type three
<b>Workforce</b>	operated entirely, or mostly by volunteers. Usually supported by an Accreditation Mentor	paid and voluntary workforce, may be supported by an Accreditation Mentor	paid senior professional manager/s, paid and voluntary workforce
<b>Management</b>	managed by a delegated management committee or department and overseen by a member of the teaching staff	managed by a delegated management committee or department and overseen by a member of the teaching staff	managed by a delegated management committee or department and overseen by a member of the teaching staff
<b>Operating budget</b>	less than £30,000 per year	£30,000-£250,000 per year	over £250,000 per year
<b>Opening</b>	seasonal and/or weekend/special event opening/ appointment only	seasonal, or open all year	seasonal, or open all year
<b>Learning offer</b>	formal learning offer within university, regular subject specialist lectures/talks external to the university	formal learning offer within university, offer to other educational and user groups in addition to university users, regular specialist lectures/talks and publications	formal learning offer within university and to multiple educational and user social groups in addition to university users, regular specialist lectures/talks and publications
<b>Visitor numbers</b>	up to 10,000 site visits per year	up to 49,999 site visits per year	over 50,000 site visits per year

## National museums

A UK national museum is governed by national legislation and directly receives central or devolved Government funding.

You offer visitor facilities deemed appropriate to a national organisation, holding and acquiring a collection of national and international significance, and provide excellent engagement opportunities through exhibitions, displays, learning and research opportunities. You are also expected to provide expertise regarding your specific subject matter to other museums, galleries and collections.

National museums must complete additional questions. These open up on the online application and returns form if you select your museum type as 'national'.

## Nationally-styled museums

The public have expectations of museums with a national name, in terms of their scale, scope and public offer.

When we refer to a nationally-styled museum, we mean one that is not funded directly by a department of government, whether UK or devolved and is not set up by primary legislation. This type of museum claims nationally significant reach and meaning and uses one of the nationally-styled names.

Nationally-styled names include the following, or equivalent, words:

*International, World, Nation, National, Europe, European, Commonwealth, Empire, United Kingdom, Great Britain, British, England, English, Wales, Welsh, Cymru, Cymreig, Scotland, Scottish, na h-Alba, Ulster, Northern Ireland, and Northern Irish.*

Nationally-styled museums may be independent, local authority or university run so it doesn't relate to a specific governance type. In every other way they should provide comparable facilities, collections and services to national museums.

Nationally-styled museums must complete additional questions. These open up on the online application and returns form if you select 'yes' when asked whether your museum has a nationally-styled name.



# Step 3 Make your Accreditation application

Read this guidance and familiarise yourself with what evidence you'll need to provide to meet the different requirements of Accreditation. We've come up with a list of suggested steps you might find helpful when making an application or return:

- Don't go it alone! Involve the team where you can throughout your planning
- Talk to your Accreditation Mentor if you have one and don't forget help is available from your Accreditation assessing organisation, Museum Development provider or Accreditation Adviser
- Familiarise yourself with what evidence you'll need to provide to meet the Standard
- Take advice/seek help where you feel you need additional support
- Check that your policies, plans and procedures are up to date
- If you need an Accreditation Mentor contact your Accreditation assessing organisation, Museum Development provider or Accreditation Adviser
- Allow time for amendment to policies and formal approval by your governing body

You'll be asked to make your Accreditation application through our online system. We'll include further information on how to access this in your eligibility confirmation letter or invitation to make a return.

We will only accept applications by hard copy or email in exceptional circumstances and where agreed in advance with your relevant assessing organisation. If you wish to provide an application or return in Welsh, please contact the Welsh Government in advance.

You can download a copy of the application questions to help you prepare from the website of your assessing organisation.

Your submission will need to be signed electronically by a member of the governing body or by an individual authorised to sign on behalf of the governing body.

## Completing the application form

At the start of the form you'll need to provide contact details for your organisation along with the selected size and type for your organisation. We'll ask for contact details for a senior representative as well as a named person as our primary contact during the assessment process.

You'll need to include your eligibility reference number ('T' number) if you're making your first application, or your Accreditation number if you're making a return.

## Multi-site services

We award Accreditation to venues not services. If you belong to a group of museums operated by a corporate body, such as a local authority service, then we'll ask each individual branch museum to apply, or provide a return, separately. Where you share documents with other museums in the group, we'll only need the lead museum applying to upload these. All other museums can then just cross-reference this in their applications where you're asked to upload a document again. If you're submitting a return, we'll ask you to report any progress against both the actions we've outlined for the group of museums, and for your museum specifically.

## National museum authorities

If you're applying on behalf of a national museum authority such as English Heritage, National Trust or Historic Environment Scotland, you'll be taken through a tailored two-stage assessment. We'll first ask you to provide a central return covering those elements which are managed service-wide such as corporate policies and plans. If you're at an individual property, we'll then ask you to provide a simplified version of your application or return covering the site-specific detail. Your own organisation can provide more information about this.

## Evidence of approval

On the Accreditation application form we'll ask you to provide evidence on how you meet each of the nine elements of the standard. In some cases, we'll simply need a confirmation that you have the relevant policies and practices in place. In others we'll ask you to upload specific key documents, for example your forward/business plan or the collections development policy of your museum.

Where we've asked you to do this, you'll need to provide evidence of approval from your governing body, or the relevant delegated sub-committee, signed by the authorised individual, for example your Chair or Cabinet member.

Appropriate evidence may take several forms depending on your organisation:

- A signed copy of a full set of minutes (signed minute)
- A signed copy of a redacted set of minutes (signed minute)
- A signed copy of an extract from the minutes that includes date of the meeting, item number and full discussion of that item, minus any redactions (signed minute)

- A published (internet) decision document (typically local authorities) – these might not actually be signed but publication is deemed evidence of approval
- A signed but unpublished decision document (typically local authorities and universities)
- A signed statement from the appropriate individual which states that the plan, policy etc has been approved by the governing body

By 'signed' we mean:

- An actual signature from the appropriate individual on a paper document
- A photocopy or scan of a document on which an actual signature exists
- An identifiable email from the appropriate individual with unsigned minutes attached that states that those minutes, redacted minutes, or extract from the minutes were approved on a particular date
- An identifiable email from the appropriate individual

## Getting help

### Who to contact

There's advice and support available to help you complete an application or a return. Each assessing organisation provides an advice team covering their geographic area. You can get further details from:

#### England

Arts Council England  
<https://www.artscouncil.org.uk/supporting-arts-museums-and-libraries/museums-accreditation-scheme>

Email: [accreditation@artscouncil.org.uk](mailto:accreditation@artscouncil.org.uk)

For Accreditation advice for non-national museums contact your regional Museum Development provider

<https://www.artscouncil.org.uk/museum-development-programme/museum-development-providers>

See regional websites for your individual Museum Development provider

#### The Isle of Man and Channel Islands

Arts Council England  
<https://www.artscouncil.org.uk/supporting-arts-museums-and-libraries/museums-accreditation-scheme>

For Accreditation advice contact the Museums Accreditation Manager

Email: [accreditation@artscouncil.org.uk](mailto:accreditation@artscouncil.org.uk)

#### Northern Ireland

Northern Ireland Museums Council  
<https://www.nimc.co.uk/>

Email: [devofficer@nimc.co.uk](mailto:devofficer@nimc.co.uk)

#### Scotland

Museums Galleries Scotland  
<https://www.museumsgalleriesscotland.org.uk>

Email: [accreditation@museumsgalleriesscotland.org.uk](mailto:accreditation@museumsgalleriesscotland.org.uk)

#### Wales

The Welsh Government  
<https://gov.wales/topics/culture-tourism-sport/museums-archives-libraries/?lang=en>

Email: [MALD@gov.wales](mailto:MALD@gov.wales)

## UK national museums

Arts Council England

<https://www.artscouncil.org.uk/supporting-arts-museums-and-libraries/museums-accreditation-scheme>

For Accreditation advice for national museums contact the Museums Accreditation Manager  
Email: [accreditation@artscouncil.org.uk](mailto:accreditation@artscouncil.org.uk)

## Accreditation Mentors

If you have an Accreditation Mentor (previously known as a Museum Mentor) to support you, contact them when you're considering making an Accreditation application or return. Their role is to give advice or signpost where to find help and guidance when you're first Working Towards Accreditation or developing a new application and your subsequent returns.

Accreditation Mentors provide support for smaller museums without access to paid professional advice. See requirement 1.3 for an explanation of what this means. Museums are responsible for finding their own mentor but your Accreditation assessing organisation, Museum Development provider or Accreditation Adviser can give you more information about how to go about this and what's involved.

## Accreditation approved resources

You can also find a range of approved resources to support your application from:

- Association of Independent Museums (AIM) <https://www.aim-museums.co.uk>
- Collections Trust <https://collectionstrust.org.uk/accreditation>

Your assessing organisation or Museum Development provider also have a range of supporting resources.

## Access support

We can provide access support for people with access needs. Please contact your assessing organisation if you experience or expect any barrier with making your application or return or would like more information.

## Guidance notes for Accreditation Standard requirements 1-3, Organisational Health

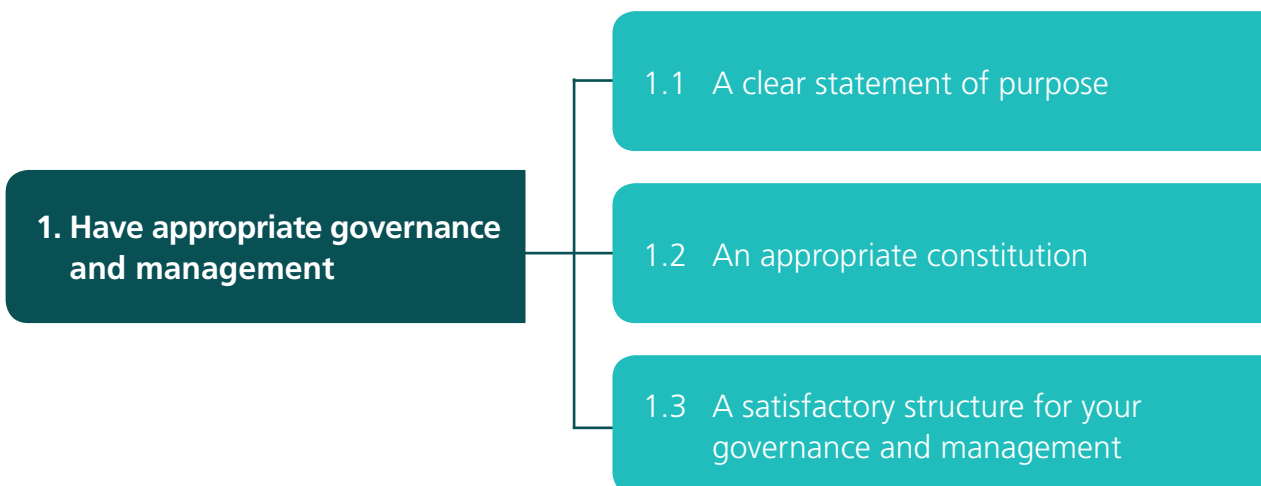
The first three requirements of the Accreditation Standard look at how you run your museum, your governance and management. You'll need to provide evidence of how you plan ahead, how

you ensure you have the resources to deliver your plan, and how you assess and manage risk in your organisation.



### 1 Have appropriate governance and management

To meet the standard, you'll need to provide evidence that you have each of the following:



## 1.1 A clear statement of purpose

	All museums	
To meet the standard, you'll need	Why is this important?	What evidence is needed?
<b>1.1 A clear statement of purpose</b>	<p>The statement of purpose defines why the museum exists and who it's for.</p> <p>It underpins all decision making and activity and should be clearly communicated and understood throughout your organisation and by your stakeholders and users.</p>	<p>This is typically located in your governing document and would be expected to appear in key policy and planning documents.</p> <p>You'll need to tell us where the statement of purpose is within your key documents – governing document, forward or business plan, and collections development policy.</p>

### Independent museums – types 1-3

Charities and Charitable Incorporated Organisations (CIOs) are guided by a constitution which will include their statement of purpose (known as the 'object' or 'objects'). This may have been written some time ago and may have been re-written as a mission statement for use in policy and planning documents. This is typically due to changes in emphasis and use of language.

Where the charitable object/statement of purpose has been re-written in this way the meaning should not be changed.

### Local authority museums – types 1-3

There may be several different statements of purpose, at different levels within the local authority. There may well be up to three levels. Where this applies please provide copies of all the relevant documents:

- A statement of purpose guiding the Council's cultural strategy (or equivalent)
- A statement of purpose drawn from the cultural strategy (or equivalent) guiding the museum service planning document
- A statement of purpose for the individual museum supporting the museum service's over-arching statement of purpose

## University museums – types 1-3

The statement of purpose will typically be located within the relevant committee terms of reference or the terms of an endowment or bequest.

## National museums

National museums are typically governed by an Act of Parliament or Royal Charter and constituted as charities guided by a constitution which will include their statement of purpose (known as the 'object' or 'objects').

## Nationally-styled museums

This will relate to your appropriate governance type.

## What we're looking for

- We'll look at the documents you submit with your application to check that the statement of purpose is clearly carried through from your governing document to key plans and policy documents, such as the forward/business plan and the collections development policy
- Where a 'simple' statement of purpose has been developed from a more complex statement, we'll look to see that the core purpose has been retained
- If the statement of purpose is supported by a more detailed or focused subsidiary statement or mission, we'll look to see how the core purpose has been maintained



## 1.2 An appropriate constitution

All museums		
To meet the standard, you'll need	Why is this important?	What evidence is needed?
<p><b>1.2 An appropriate constitution</b></p>	<p>Museums are long-term organisations that exist to benefit the public and protect their assets, including collections.</p> <p>Constitutions are important to museums because they are legal documents which set out the organisation's intentions towards long-term public benefit and protection for collections.</p> <p>Your governing document must enable you to do this.</p>	<p>This refers to your governing document. This is a legal document that sets out an organisation's aims and, usually, how it is administered.</p> <p>We'll need to see this document(s) if it's your first application or if it's changed since your last return. You'll need to provide us with a copy of the latest approved version. If your governing document hasn't changed since your last submission we won't need to see it again.</p> <p>Your museum's current governing documents need to cover the following constitutional criteria:</p> <ol style="list-style-type: none"> <li>1. Exists for public benefit</li> <li>2. Can demonstrate its collections and assets are appropriately protected</li> <li>3. Has powers to operate a museum and hold collections and assets. These powers must be transparent and should not include the ability to distribute assets or profit for private gain</li> <li>4. Is subject to statutory regulation or judicial process in relation to its conduct</li> <li>5. Must be a permanent entity with a long-term purpose</li> </ol>

For more information on constitutional arrangements, see *Museum Constitutional and Governance Arrangements* (written by Dawn Langley, Alchemy Research and Consultancy commissioned by Arts Council England on behalf

of the UK Accreditation Partnership, November 2018). This is available from your Museum Development provider, Accreditation Adviser or assessing organisation.

## Independent museums – types 1-3

Charities and CIOs are guided by a constitution. This is your governing document - a legal document that sets out an organisation's aims and, usually, how it is administered.

The constitution should give the power to hold and/or own a collection and to operate a museum within either its primary objectives or a subordinate clause. If you're a registered/recognised charity, you'll also have to be registered with the relevant regulatory authority (Charity Commission, Office of the Scottish Regulator).

You'll need to provide a copy of your governing document.

Where registration isn't possible, the museum should evidence charitable recognition from HM Revenue and Customs (HMRC) <https://www.gov.uk/charity-recognition-hmrc>

## Local authority museums – types 1-3

Local authority museums are deemed to have the power to operate museums through the relevant Act of Parliament or Order (Northern Ireland):

- England & Wales: Public Libraries and Museums Act 1964; Local Government Act 1972
- Scotland: Public Libraries Consolidation (Scotland) Act 1887
- Northern Ireland: The Museums and Galleries (Northern Ireland) Order 1998

Local authority museums may be the principal authority or a town, community (Wales) or parish council where authority has been delegated. Local authorities may also have powers to operate museums through an appropriate Local Authority Act.

Whether your constitutional arrangements are directly managed or contracted you'll need to attach your museum's current governing documents. This might be given as a copy of the museum's constitution, or reference to the relevant Act of Parliament, Order, or Local Authority Act. In some cases, museums may be charitably constituted, and the local authority acts as its sole trustee. In this case we would need to see the legal agreement by the local authority which empowers the charitable trust to run the museum.

So we can clearly understand any contracted arrangements, you'll need to provide copies of any agreements between the local authority and the managing organisation. This might include documents such as a management or service level agreement, or a collections loan agreement.

## University museums – types 1-3

Universities are deemed to have the power to operate museums where eligibility criteria are met. The governing document will typically be located within the relevant committee terms of reference or the terms of an endowment or bequest.

You'll need to provide a copy of your governing document.

## National museums

National museums are typically governed by an Act of Parliament or Royal Charter and constituted as charities guided by a constitution which will include their statement of purpose, known as the 'object' or 'objects'.

The regulatory body may be the Parliament from which the Act originated, whether UK Parliament or devolved, rather than the Charities Commission or the Office of the Scottish Charity Regulator (OSCR).

You'll need to provide a copy of your governing document.

## Nationally-styled museums

Your governing document will relate to your appropriate governance type.

## What we're looking for

- We'll check that the governing document is the latest approved version
- We'll check that the information you've provided matches that held by the relevant regulatory bodies
- We'll check that the name of the organisation is consistent with your governing body.
- We'll look at whether or not there are any linked or subsidiary organisations (for example a collections holding trust)
- We'll check if your governance arrangements are clear
- We'll check if your constitution gives you the powers to operate a museum
- We'll look at what opportunities for public access and engagement you provide with your assets and collection/s
- We'll check if your constitution gives you the powers to hold assets and collection/s
- We'll look at whether or not your assets and collection/s are suitably protected and only utilised for public benefit
- We'll check if you have a governing body constituted under your governing documents
- We'll check your constitution shows you have a long-term purpose

## 1.3 A satisfactory structure for your governance and management

All museums		
To meet the standard, you'll need	Why is this important?	What evidence is needed?
<p><b>1.3 A satisfactory structure for your governance and management</b></p>	<p>There needs to be a management structure in place outlining appropriate authorities, roles and responsibilities to allow formal decision making and accountability.</p> <p>Your museum needs an appropriate workforce to run it effectively and must have effective employment policies, plans, procedures and roles in place to meet its responsibilities.</p>	<p>You'll need to describe your management arrangements.</p> <p>You'll need to confirm who has the authority and responsibility to approve decisions and provide supporting documents for this.</p> <p>You'll need to confirm who has the authority to approve museum policies and plans.</p> <p>If a separate organisation runs the museum, we'll need to see any approved agreements between that organisation and the governing body.</p> <p>You'll need to tell us how you access advice from museum professionals for policy development and decision making.</p> <p>If you have an Accreditation Mentor you'll need to provide the signed mentor agreement, a signed minute confirming the appointment and a mentor report.</p> <p>You'll need to confirm arrangements you have in place for recruitment, induction, identifying training needs, training, learning and development and succession planning.</p> <p>You'll need to provide a copy of your organisation or workforce chart.</p> <p>You'll need to provide a copy of your written volunteer agreement or equivalent document outlining specific roles and responsibilities.</p>

We'll want to see that the experience of the museum professional is appropriate to your size and type, and that there's a clear line of communication between the museum professional and your governing body. The level of advice in place should be appropriate to the size, scope, vulnerability and value of your museum and collections. For smaller museums, without paid professional staff, this can be met by appointing an Accreditation Mentor.

A museum professional is defined within Accreditation as having:

- 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're keeping their knowledge, skills and experience up to date

Museum professionals (including Accreditation Mentors) can serve on a museum's governing body as a voting member.

We expect the Accreditation Mentor to attend at least one meeting of the governing body a year and visit the museum at least once a year. We'll ask for an Accreditation Mentor report to accompany your application or return. This can be uploaded to the online form or provided separately to your Accreditation assessing organisation.

## Independent museums – types 1-3

Where the governing body has set up a managing committee to manage the museum or this is managed by a legally separate organisation, we'll need to see clear and agreed terms of reference and responsibility from the governing body.

The expectation for type 1 independent museums is that they are operated entirely, or mostly, by volunteers; usually supported by an Accreditation Mentor. There is also likely to be a mixture of paid and volunteer staff for type 2 so an Accreditation Mentor may also be appropriate. For a type 3 the expectation is that the museum would employ a paid museum professional.

We'll look to see how your governing body engages with your Accreditation Mentor.

## Local authority museums – types 1-3

The line of authority will depend on whether a cabinet or council model is in operation. We'll look at how the line of authority and approvals link from the governing body (Council) to museum activities. This will usually be covered within the Council's terms of reference and its delegation scheme.

A paid museum professional must be present. Where a service manages a number of sites it's not expected that each individual museum has its own dedicated staff so long as all have access to museum professional staff and this is appropriate to size and scale.

## University museums – types 1-3

The overall governing body will typically be the university council or senate and we'll look for a clear line of authority from the governing body to museum activities. Universities may have a specific managing committee where we'll look to see that delegated authority is in place for approvals.

Where the museum is managed by university staff as part of their teaching role the expectation is that their responsibilities to the museum will be clearly covered within their job description.

## National museums

### Nationally-styled museums

This will relate to your appropriate governance type.

You'll need to confirm that you employ multiple museum professionals, covering a range of core activities.

You'll need to tell us what staffing arrangements are in place to support research at your museum.

You'll need to explain how your professional staff provide expert advice to other museums, galleries and collections. This could be through Accreditation mentoring but there's a range of other ways to demonstrate how you deliver sector support.

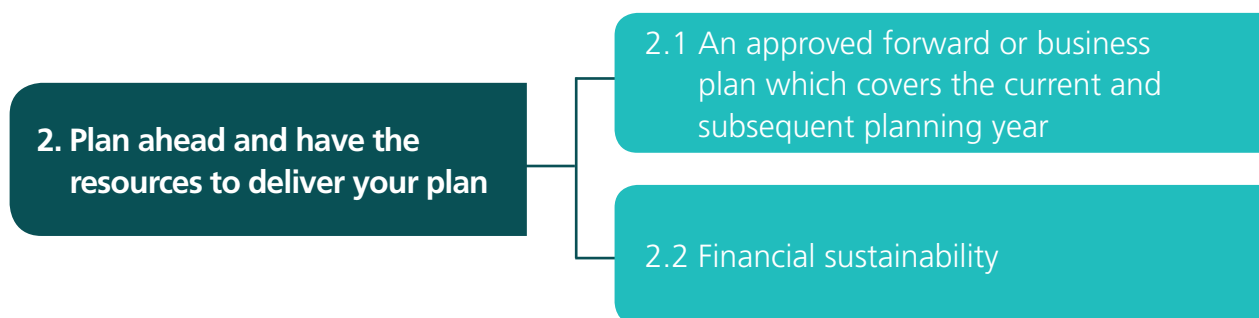
## What we're looking for

- We'll look for clear evidence of delegated authority with approved terms of reference for all managing committees and sub-committees
- We'll look at who, or which group, has the authority and responsibility for approving policy documents. This might include decisions you delegate to sub-committees, staff or volunteers
- If a legally separate managing organisation manages the museum, we'll ask to see your approved agreement, for example a Service Level Agreement. This needs to show who is responsible for what functions and who pays for what, as well as where any monies generated are directed. Who has ownership of the collection, as well as ownership of collected items, must be clear
- We'll check that your governing body has access to museum professional advice for policy making, appropriate to your size and type
- We'll check that your organisational structure is coherent, up to date and appropriate to the size and scale of your museum
- We'll look at whether there are sufficient roles present in your workforce to deliver your forward/business plan effectively, appropriate to your size and type
- We'll look at the number of frozen/vacant posts and see what plans you have to re-appoint or mitigate the effect of these vacancies
- We'll check that you have appropriate strategies and procedures in place for recruitment, induction, identifying training needs, training, learning and development and succession planning for your governing body, paid staff and volunteers
- If you have an Accreditation Mentor, we'll check that you've formally appointed them and will want to know how you work together so you have access to professional advice and can use this to help inform your decision making
- If applicable, we'll ask for an Accreditation Mentor report to accompany your application or return



## 2 Plan ahead and have the resources to deliver your plan

To meet the standard, you'll need to provide evidence that you have each of the following:



### 2.1 An approved forward or business plan which covers the current and subsequent planning year

All museums		
To meet the standard, you'll need	Why is this important?	What evidence is needed?
<b>2.1 An approved forward or business plan which covers the current and subsequent planning year</b>	<p>Museums should plan effectively for the long-term and be able to adapt in a changing environment.</p> <p>Your forward or business plan sets out the key aims and objectives for your organisation and how they will be delivered over a specific time and to a specific budget.</p> <p>We ask to see it so that we can understand how your organisation plans for the future.</p>	<p>Forward or business plans come in all shapes and formats. Your plan should be appropriate to the size of your museum, the context, scale and ambitions of your operations.</p> <p>There is no standard template for forward or business planning. While we'll need to see certain elements, it is your document. If you use other elements in your planning, please include them.</p> <p>We don't expect you to produce a plan purely for Accreditation purposes.</p>

All museums		
To meet the standard, you'll need	Why is this important?	What evidence is needed?
<p><b>2.1 An approved forward or business plan which covers the current and subsequent planning year</b></p>		<p>Your forward/business plan should be approved by your governing body and should include:</p> <ul style="list-style-type: none"> <li>• Statement of purpose</li> <li>• The period the plan covers</li> <li>• The key aims you want to achieve over the plan's duration</li> <li>• How you'll achieve these aims</li> <li>• What you'll need to achieve these aims, including people, equipment and money</li> <li>• Budgets for the current and subsequent planning year</li> <li>• A review date</li> </ul> <p>You'll need to provide a copy of your forward/business plan and signed approval from your governing body.</p> <p>Your statement of purpose and key aims must be approved by the governing body or by those approved to take delegated decisions (see section 1.3).</p> <p>It's likely that your specific objectives and budgets may change within a year, and so we don't need these elements to be formally approved.</p>

## Independent museums – types 1-3

Smaller organisations will not be expected to provide similar scale forward or business plans to those provided by much larger institutions, but the elements described on the previous page should be in place.

## Local authority museums – types 1-3

Within local authority structures, multiple plans and planning cycles might well exist. It's typical for a cultural strategy or similar to provide the context for planning.

If you have a broader service or division plan, we'd need to see individual site plans, or be able to distinguish your activity within any larger plans. We'll want to see all levels of the plan, along with appropriate approvals, as part of your application or return.

## University museums – types 1-3

University museums might work within multiple plans and planning cycles. Often a university strategy or similar provides the context for planning.

The school or department may also then respond to this with their own plan.

Whatever the context, we would expect to see a museum plan tying into the most closely related university strategy or plan. We'll want to see all levels of the plan, along with appropriate approvals, as part of your application or return.

## National museums

### Nationally-styled museums

We'll expect to see formal consultation processes with internal and external stakeholders in place for your forward or business plan.

We'll check that you have a review mechanism in place for your plan and how you're monitoring your performance and using this information to improve services.

You'll need to show where your plan demonstrates national aspiration and delivery.

## What we're looking for

- We'll check that the statement of purpose is consistent with your governing document
- We'll look at the elements of the forward or business plan to see that there's appropriate detail for the size and type of your museum
- We'll check there is a clear link between aims, objectives and resources
- We'll check that there is action and resource planning to achieve your objectives
- We'll check that the plan links effectively to associated strategies, plans and policies
- We'll want to see a clear process for approval of your plan is in place (appropriate to governance type) and accompanying evidence of approval
- We'll look to see that the forward or business plan covers at least the current and subsequent planning year (led by the museum's own financial and planning cycles)

## 2.2 Financial sustainability

	All museums	
To meet the standard, you'll need	Why is this important?	What evidence is needed?
<b>2.2 Financial sustainability</b>	<p>Museums must be resilient and sustainable to survive.</p> <p>You must be able to demonstrate that your museum is financially sustainable, and that you have the financial resources to deliver your forward/ business plan.</p> <p>This shows us that you are a long-term organisation and confirms that you are not unethically selling collections or using them as collateral.</p>	<p>You'll need to provide copies of accounts for the last two available financial planning years. These should show final income and expenditure for the previous two years for your museum operation (or a web link to published accounts).</p> <p>Income and expenditure must be clear, regardless of the size of the budget.</p>

### Independent museums – types 1-3

We'll need the last two years of audited accounts as required by appropriate Regulator, such as the Charity Commission/Office of the Scottish Charity Regulator.

Where your museum's operating budget is below the charity regulator's reporting thresholds your accounts don't need to be audited but you'll need to show that you're meeting charity reporting requirements and/or keeping accounting records.

### Local authority museums – types 1-3

We'll need the last two years actual final income and expenditure for previous two years. Council budget books are not acceptable, although evidence should remain compliant with governing body procedures.

Details of cost centre breakdowns for specific museum related activity and expenditure should be provided.

## University museums – types 1-3

We'll need the actual final income and expenditure for previous two years.

## National museums

We'll need the annual accounts for the previous two years as published.

## Nationally-styled museums

We'll need the annual accounts for the previous two years as published.

## What we're looking for

- We'll check to see how you manage your finances and allocate these to identified objectives
- We'll check that the accounts are sufficiently detailed to show expenditure on museum activities such as conservation, exhibitions, premises maintenance, operation
- We'll look at your financial sustainability and check that the museum isn't overly dependent on one source of funding and that any associated risks have been considered, with a clear mitigation strategy in place if this funding is no longer available
- We'll check that collections are not being used as collateral (where something is put up as security for repayment of a loan)
- We'll check that collections aren't being used as a source of income through unethical sale

## 3 Assess and manage risk to your organisation

To meet the standard, you'll need to provide evidence that you have each of the following:



### 3.1 Secure occupancy of all premises containing collections

	All museums	
To meet the standard, you'll need	Why is this important?	What evidence is needed?
<b>3.1 Secure occupancy of all premises containing collections</b>	To ensure the long-term preservation of collections, your occupancy arrangements must be sufficient to keep your displayed and stored collections secure and allow effective forward planning.	You'll be asked to confirm occupancy information for all buildings holding collections.  Where occupancy arrangements are for less than 12 months you'll be asked to outline your contingency planning to ensure the long-term protection of the collection (for example showing contingency planning in your forward or business plan).

# Organisational Health

Legal definitions and meaning in relation to land law and ownership vary across the UK, particularly between Scotland and England, so occupancy arrangements can be found in:

- Freehold documentation absolute interests in land (Scotland)
- Tenancies
- Leaseholds
- Licences
- Permissions to occupy (Ministry of Defence)
- Other forms of tenancy agreement

## What we're looking for

- We won't normally ask to see written terms of occupancy, other than in complex cases or where challenges have been highlighted as part of previous assessments
- We'll check long-term arrangements (usually at least 12 months) are in place
- We'll look for short or very short notice periods and check to see how risks are managed within the forward/business plan including evidence of contingency planning to ensure the long-term protection of the collection
- We'll check whether any buildings are occupied without formal written agreements and what evidence or explanation has been provided
- If we come on a site visit, we'll check that all buildings housing collections have been included



## 3.2 A risk assessment of security arrangements

	All museums	
To meet the standard, you'll need	Why is this important?	What evidence is needed?
<b>3.2 A risk assessment of security arrangements</b>	<p>A risk assessment of your security is a crucial part of ensuring the long-term preservation of collections and your museum. It should identify threats to collections, people and buildings and help you address or mitigate them.</p>	<p>The appropriate source of security advice will vary according to the size, scope, vulnerability and value of your museum and collections.</p> <p>Advice will need to cover arrangements for your workforce, visitors, buildings and collections – in store, on display, in offices or off-site – and collections information.</p> <p>Arrangements for all these areas should be reviewed at least once every five years.</p> <p>You'll need to show how recommendations have been, or will be, implemented, for example by providing references from your forward or business plan.</p>

Security advice can come in a variety of forms – if you can, you should get expert advice.

This could be from:

- An internal specialist or specialist from another museum
- Your local police liaison/community safety officer
- Your alarm or insurance provider
- The National Security Adviser at Arts Council England

The security advice will need to look at all aspects of your museum and its collections, from the physical security of the building to how you secure the information you hold on collections, for example, confidential information such as lists of the most valuable objects in your collection.

If you can't get expert advice, we'll expect you to undertake a risk assessment covering workforce, visitors, buildings and collections – on display and in store – and about the nature of your museum, the collections and the information you hold on them. Collections Trust has information and templates on security audits and a security toolkit. These resources should be used if you can't access expert advice and your risk assessment has come out as low risk.

A security report could be produced from notes you've made of verbal recommendations, your own audit or a formal report received from a security expert. We won't ask you to send this in with your online form.

If we visit you, we'll ask to see your security assessment.

## What we're looking for

- We'll check to see that the review covers all aspects of security and is proportionate to the size and type of your museum and scale of your collections
- We'll ask for confirmation that you have a plan in place for implementing the recommendations
- We'll ask how many of the recommendations you've implemented and look to see whether any actions arising from recommendations are referenced in your forward or business plan
- We'll check your plan has been reviewed within the last five years

## 3.3 A clear, workable emergency plan

To meet the standard, you'll need	All museums	
	Why is this important?	What evidence is needed?
<p><b>3.3 A clear, workable emergency plan</b></p>	<p>Having an emergency plan that you've tested ensures that you can respond quickly and effectively to emergencies or disaster situations, protecting people, collections, collections information and buildings.</p>	<p>Your emergency plan will be appropriate to the size of your museum and composition of your collections. It will include:</p> <ul style="list-style-type: none"> <li>• Arrangements for the staff and volunteers, visitors, collections and collections information</li> <li>• A risk assessment of threats</li> <li>• Information on how the plan is authorised, maintained, communicated, tested, and made available to your staff and volunteers and the emergency services</li> <li>• How you work with the emergency services</li> <li>• How your plan links to any other relevant emergency plans, for example if you share a building with another organisation</li> <li>• An understanding of salvage priorities and information on first aid steps for damaged objects</li> <li>• A review procedure and date of review</li> </ul> <p>You'll need to confirm what elements the emergency plan covers and when it was last reviewed.</p>

# Organisational Health

You need to consider and assess what threats there are to your operation. Typically, these include fire, water, theft, and vandalism. Your plan should cover the procedures you would implement in an emergency and will outline the actions you'll take to secure and care for all your assets, both during and after an emergency. These include people, buildings, collections, and the information you hold on collections.

If these are outlined in other documents, you'll need to let us know where in your application.

Those who work or volunteer at your museum should know about the emergency plan and you should carry out regular testing and discussions around emergency planning with the whole workforce.

Your emergency plan should inform your broader collections care processes and procedures, for example, when selecting priority objects for salvage and retrieval.

We'll typically only ask you for a copy of your plan if we visit you for an Accreditation site visit, if your museum has undergone a major redevelopment, or where we have concerns.

You'll need to ensure that the plan is reviewed every five years, and immediately after any significant changes to buildings and contents, for example, a redevelopment. If you have suffered a disaster situation you may need to look at how well your plan has functioned and make changes to improve its operation.

## What we're looking for

- We'll check that the emergency plan covers arrangements for the workforce, visitors, collections, and information on the collections
- We'll confirm it includes information on how you authorise, maintain, communicate and test your plan, and how you make it available to your workforce and the emergency services
- We'll check how often the plan is tested and the date of its last review

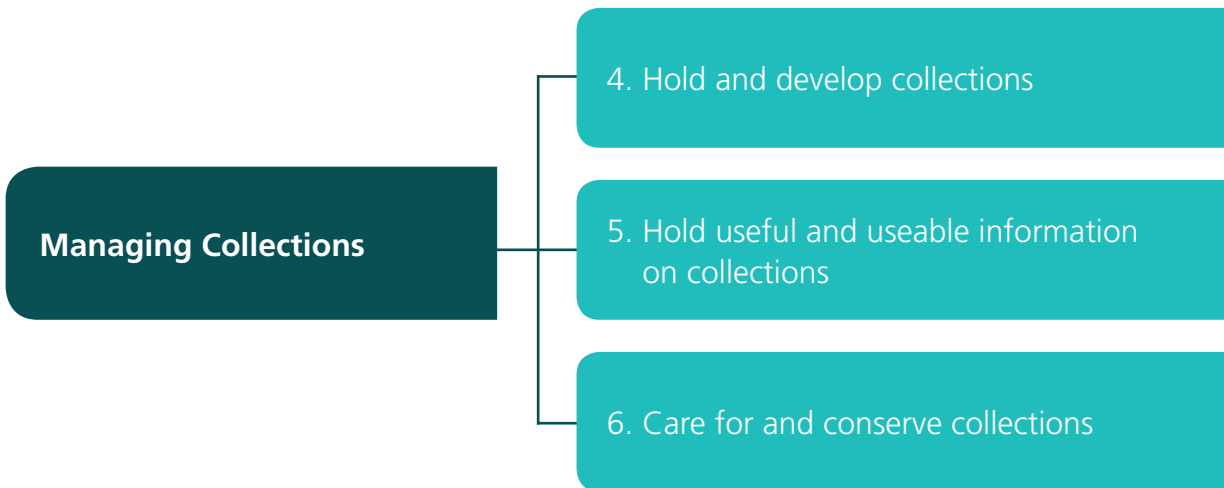
## Guidance notes for Accreditation Standard requirements 4-6, Managing Collections

The next three requirements of the Accreditation Standard look at how you manage your collections. It will cover how you develop, document and look after your collections. Different museums approach collections management and planning in different ways.

You may have brought together all your collections management policies into a single document. Your plans might appear in a separate collections management plan or within your forward/business plan.

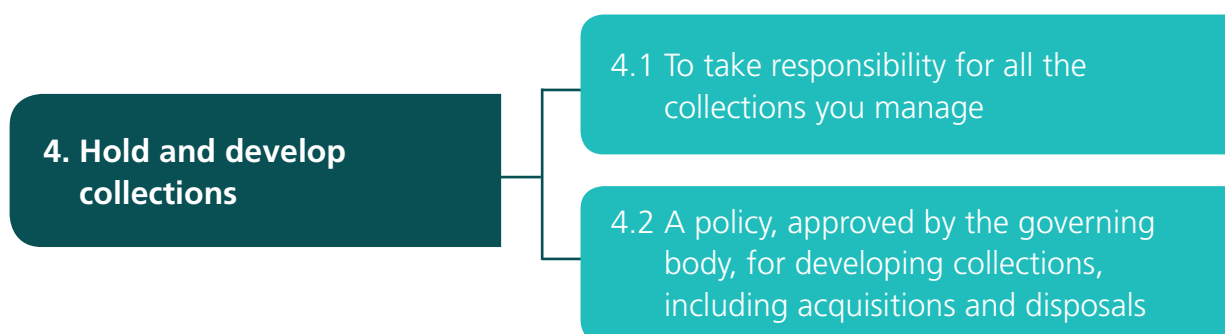
Larger organisations may follow *PAS 197:2009 Code of practice for cultural collections management* and develop a suite of policies across all areas of collections development, collections documentation, collections care, and conservation and collections access.

In each case you'll need to reference the relevant document or section on the application form.



## 4 Hold and develop collections

To meet the standard, you'll need to provide evidence that you have each of the following:



### 4.1 To take responsibility for all the collections you manage

	All museums	
To meet the standard, you'll need	Why is this important?	What evidence is needed?
<b>4.1 To take responsibility for all the collections you manage</b>	<p>To be accountable for your collections you need to know what you own and which collections are on loan, and ensure you have up to date loan documentation.</p> <p>Robust ownership and loan and/or management agreements are critical for the long-term sustainability of your museum.</p>	<p>You'll be asked to confirm the size of your collection, the proportion the museum owns, the proportion on loan to it and whether any associated loan agreements are up to date.</p> <p>If most of your collection is on loan, we'll ask you to explain the loan arrangements in place and assess any risks.</p> <p>You'll only need to upload copies of key loan agreements if these relate to a sizeable proportion of the museum's collection (more than 50%).</p>

# Managing Collections

Your museum policy documents and procedures should clearly show and evidence the ownership arrangements of the current collections and who will own new acquisitions to the collections (see 4.2). Often the governing body will own the majority of collections, although it may be the case that all, or a significant proportion of the collections, are owned by a separate organisation or individual/s, for example a local authority

or a separate collections trust. If you hold any collections that are on loan, the duration of the loan must be appropriate and include regular review between the museum and the owner. The term 'permanent loan' has no legal status and should be avoided. You should make sure that all loans have an associated fixed term loan agreement meeting Spectrum standards (see 5.2).

## What we're looking for

- We'll check what proportion of the collection is on loan and if there are up to date loan agreements in place. If not, we'll check how the ownership of legacy loans is being managed
- If most of the collection is on loan, we'll want to know you're aware of and are managing any associated risks
- We'll cross-reference with your response to sections 4.2 (collections development policy) and 5.2 (Spectrum primary procedures) to check if collections with unclear ownership feature within your documentation plan
- If you have attached a service level agreement or significant loan/management agreement, we'll check to see who is responsible for new acquisitions and disposals. This agreement should be signed by both parties

## 4.2 A policy, approved by the governing body, for developing collections, including acquisitions and disposals

	All museums	
To meet the standard, you'll need	Why is this important?	What evidence is needed?
<p><b>4.2 A policy, approved by the governing body, for developing collections, including acquisitions and disposals</b></p>	<p>The policy underpins the development of your collections. It shows how your collections development activities (acquisition, appraisal, deaccessioning, and disposal) link clearly to your statement of purpose and meet ethical commitments and legal requirements.</p> <p>Using the Accreditation template as the basis for your policy means museums have a shared language in relation to acquisition and disposal.</p>	<p>Your collections development policy must include:</p> <ul style="list-style-type: none"> <li>• Your statement of purpose</li> <li>• A history of the collections</li> <li>• An overview of current collections</li> <li>• Themes and priorities for future collecting</li> <li>• Themes and priorities for rationalisation and disposal</li> <li>• Information on the legal and ethical framework for acquisition and disposal</li> <li>• Reference to the collecting policies of other museums where you collect in the same or related areas or subject fields. Reference to any formal collecting relationships for example joint acquisition agreements etc</li> <li>• Review date</li> </ul> <p>You'll be asked for a copy of your collections development policy with signed approval.</p> <p>If you have a collections management policy framework, you'll need to tell us where to find details on collections development. If you've published elements of your collections development policy separately, for example a spoliation statement or a due diligence policy then you need to provide links to the published documents with relevant approvals.</p>



# Managing Collections

Use the Accreditation collections development policy template alongside these guidance notes.

## Practical guidance notes: which template should we use?

If your policy hasn't been reviewed since May 2014 we'll expect it to be updated to the 2014 template. Earlier versions of the template have been replaced by this version.

The 2014 template replaces the earlier template published in December 2011 and all previous versions of the acquisitions and disposals policy template. It was reprinted in November 2018 in support of the 2018 Accreditation Standard.

Collections development policies should be reviewed at least every five years. It's a good idea to make the policy start and end dates really clear on your document.

Our collections development policy template was developed to help museums produce a robust and effective policy, relevant to their collections and statement of purpose. Our template includes standard clauses (in bold type) that all museums should include. Many of these relate to the legal responsibilities of museums as directed through Acts of Parliament, or International Conventions to which the UK is signatory. The standard clauses in our template have been checked so museums don't have to seek separate legal advice. We'll read your policy thoroughly and carefully check that any changes to the template clauses don't dilute the meaning of the wording.

## Practical guidance notes: where can we find the template?

The template is available to download online, from your Accreditation assessing organisation or Museum Development provider.

	Assessing organisations
<b>England</b>	Arts Council England <a href="https://www.artscouncil.org.uk/supporting-arts-museums-and-libraries/museums-accreditation-scheme">https://www.artscouncil.org.uk/supporting-arts-museums-and-libraries/museums-accreditation-scheme</a>  Regional Museum Development providers <a href="https://www.artscouncil.org.uk/museum-development-programme/museum-development-providers">https://www.artscouncil.org.uk/museum-development-programme/museum-development-providers</a>
<b>The Isle of Man and Channel Islands</b>	Arts Council England <a href="https://www.artscouncil.org.uk/supporting-arts-museums-and-libraries/museums-accreditation-scheme">https://www.artscouncil.org.uk/supporting-arts-museums-and-libraries/museums-accreditation-scheme</a>
<b>Northern Ireland</b>	Northern Ireland Museums Council <a href="https://www.nimc.co.uk/">https://www.nimc.co.uk/</a>
<b>Scotland</b>	Museums Galleries Scotland <a href="https://www.museumsgalleriesscotland.org.uk/">https://www.museumsgalleriesscotland.org.uk/</a>
<b>Wales</b>	The Welsh Government <a href="https://gov.wales/topics/culture-tourism-sport/museums-archives-libraries/?lang=en">https://gov.wales/topics/culture-tourism-sport/museums-archives-libraries/?lang=en</a>

## Practical guidance notes: how do we fill the template in?

These notes are to read alongside the template to help you write, review or update your own policy. The italics in the template show you where to add your own text and include your museum details. In some places you can choose from different paragraphs or clauses so select the option which fits with your museum policy approach.

You can also adapt your policy to select the clauses appropriate to your relevant Accreditation organisation: for museums in England, Isle of Man and the Channel Islands this is Arts Council England, in Wales this is the Welsh Government, in Scotland this is Museums Galleries Scotland and in Northern Ireland this is the Northern Ireland Museums Council.

### 1 Introduction

This section should include your museum's statement of purpose as your development of collections will be led by this. Describe which other policies or plans it relates to and who it's intended for.

### 2 History of the collections

This section reviews the history of your collection. Are there any key milestones in the development of your collections such as significant acquisitions or particularly influential curators and donors? Have there been any major changes in focus for the collections? If so, outline these and describe any key disposals (where relevant).

### 3 Overview of current collections

This section considers your collection strengths, weaknesses, and current uses. Describe what is in the accessioned collection, its size, coverage and significance. Are there any areas which are particularly strong? What types of collection do you hold? How does your collection fit with your statement of purpose and key aims? Are there any parts of your collection which don't fit

with this? Include any material that you haven't accessioned and explain why you've decided it's not appropriate, for example a handling collection or surrogates.

### 4 Themes and priorities for future collecting

What are your priorities for collecting? What are you planning to collect and why? How does this relate to your statement of purpose and forward/business planning? Are there any restrictions on this and if so, why?

Being clear about this will help guide strategic decision making and will support practical objects entry procedures.

### 5 Themes and priorities for rationalisation and disposal

What's your approach? Which areas of the collections will be considered for rationalisation and disposal and why? Are there any restrictions on this and if so, why? For example, it's not permitted within your museum's governance or bequest conditions.

You could also tell us if this isn't a priority within the period of your policy (there's no active rationalisation and disposal). There may be reasons you'll need to undertake disposals for legal, safety or care and conservation reasons (for example spoliation, radiation, infestation, repatriation). These are some areas you could consider in your policy.

### 6 Information on the legal and ethical framework for acquisition and disposal

This section describes the legal and ethical frameworks that the museum works within. The standard paragraph references the MA Code of Ethics which is a minimum requirement. We've already covered the primary legal and ethical requirements of all Accredited museums. You may add additional ones in this section, where appropriate.

## 7 Collecting policies of other museums

In this section list any museums which you seek to work with to avoid duplication of effort or the wasting of resources, or partner with in order to joint purchase. Are there any other museums collecting in the same area as you or that are geographically close? This might be a formal collecting relationship with another museum such as a joint acquisition agreement.

## 8 Archival holdings

This clause is optional within the template policy depending on whether your museum holds or intends to collect material which may be considered archival, for example documents and photographs – in paper-based or digital formats. If so, describe your rationale and approach to developing this collection.

Museums with archival material may also wish to look at the Archive Service Accreditation Scheme for these collections.

<http://www.nationalarchives.gov.uk/archives-sector/archive-service-accreditation/>

## 9 Acquisition

Use this section to describe your authorisation policy for agreeing acquisitions. For example, this might include levels of delegation relating to costs of acquisition. There are standard paragraphs to include in this section.

## 10 Human remains

Whether or not your museum holds or collects human remains you'll still need to choose from the standard paragraphs in the template. You can expand on this if you do hold or intend to collect human remains.

## 11 Biological and geological material

Choose the appropriate paragraph for your museum.

## 12 Archaeological material

You'll need to choose from the paragraphs in this section, as appropriate.

## 13 Exceptions

This section outlines when exceptions to the broader collecting policy relating to exceptional circumstances might occur. We've included a standard paragraph for this.

## 14 Spoliation

This section describes your policy relating to spoliation of works of art during the Holocaust and Second World War period. We've included a standard paragraph for this so choose the one which applies for your governance type.

## 15 Repatriation and restitution of objects and human remains

This section describes your museum's policy relating to the returning of objects and human remains. You'll need to choose from the paragraphs in this section, as appropriate.

## 16 Disposals procedures

This section confirms you have an agreed and approved method in place for taking objects out of your long-term collections. You can choose which paragraphs to use from the disposal by exchange section (16.13).

It's important to use the standard paragraphs as these also match the Museums Association Disposal toolkit and Spectrum procedures.

## National museums

## Nationally-styled museums

If your museum is a national or uses a nationally-styled name, we'll also ask you to explain how your collection's national importance and international interest supports your name and stated objectives. We'll expect your policy to cover your approach to collecting items of national scope and importance and associated information.

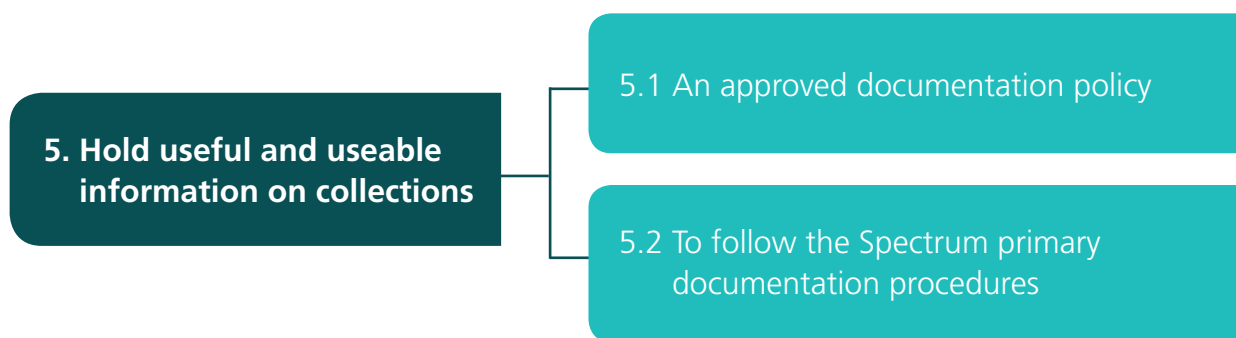
You'll need to provide a list of acquisitions from the last 12 months.

## What we're looking for

- We'll check that the policy fits with the statement of purpose and is proportionate
- We'll check that the policy is compliant with the required legal and ethical clauses in the template
- If the constitution of your museum doesn't permit the inclusion of all the required clauses we'll check that there are safeguards in place to ensure the long-term preservation of the collection, and responsibility for acquisition and disposal procedures
- We'll check that the description of the collections provides a clear overview to guide future acquisitions and/or disposal as appropriate
- We'll check it contains appropriate information about rationalisation and disposal
- We'll check that you've included relevant collecting remits of other museums, local record offices, and archives
- We'll check your policy has signed approval in place
- If the collection is owned by a separate organisation as described in a loan or management agreement we may need to check approvals from both the collection owning body and the collection managing body. It depends how your policy approval powers have been delegated
- We'll check your policy covers a clear time period and has been reviewed within the last five years

## 5 Hold useful and useable information on collections

To meet the standard, you'll need to provide evidence that you have each of the following:



## 5.1 An approved documentation policy

To meet the standard, you'll need	All museums	
	Why is this important?	What evidence is needed?
<p><b>5.1 An approved documentation policy</b></p>	<p>The policy or statement ensures your collections documentation activities provide you with useful and useable information, linked to your statement of purpose, and meet ethical commitments and legal requirements.</p>	<p>The documentation policy or statement should aim to cover the following areas:</p> <ul style="list-style-type: none"> <li>• Accountability – ensuring you record sufficient information about the objects in the care of your museum so that each object for which you're legally responsible (including loans) can be identified and located</li> <li>• Standards in procedures and processes – with a commitment to maintaining minimum professional standards, for example Spectrum</li> <li>• Accessibility – the policy should define access to collection information for your community of users</li> <li>• Security – ensuring measures are in place for the physical security and long-term preservation of documentation records, whether paper or digital including back up and secure storage</li> </ul> <p>The policy should be reviewed and re-approved by your governing body – at least every five years.</p> <p>You'll be asked for a copy of your documentation policy or statement with signed approval.</p> <p>If you have a collections management policy framework, just tell us where to find the details about collections documentation.</p>

# Managing Collections

The policy should take into account that electronic systems may become outdated and ensure the long-term accessibility of the information held. For example, will the system you currently use still be accessible in 10 years' time?

If you've outsourced the operation of your museum to a third party, there should be a clear relationship between the management agreement and the collections documentation

policy. Mechanisms for auditing collections documentation against required standards should be explicit in the management agreement. It's important that both parties have separately defined roles and responsibilities so that there's no duplication and it's clear who is accountable for different areas such as data control and requests.

## What we're looking for

- We'll check that the policy is appropriate for your size and scale of museum and proportionate with your wider forward/business plan and available resources
- We'll check that the policy fits with the statement of purpose and key aims of your museum
- We'll check your policy has signed approval in place
- We'll check that the policy draws upon the relevant policy guidance in Spectrum
- We'll check that the policy reflects the requirements of a management agreement (where museum operations are outsourced)
- We'll check that the policy covers a clear period and has been reviewed within the last five years

## 5.2 To follow the Spectrum primary documentation procedures

All museums		
To meet the standard, you'll need	Why is this important?	What evidence is needed?
<p><b>5.2 To follow the Spectrum primary documentation procedures</b></p>	<p>The Spectrum primary procedures are essential for managing collections effectively, providing accountability to your governing body, stakeholders and funders, and enabling you to make them accessible to those who wish to use them.</p> <p>It's important for stakeholders to know collections are documented adequately and that the museum is following museum standards for collections information.</p>	<p>Your documentation procedural manual should cover the primary documentation procedures in the Spectrum standard:</p> <ul style="list-style-type: none"> <li>• <i>Object entry</i></li> <li>• <i>Acquisition and accessioning</i></li> <li>• <i>Location and movement control</i></li> <li>• <i>Inventory</i></li> <li>• <i>Cataloguing</i></li> <li>• <i>Object exit</i></li> <li>• <i>Loans in (borrowing objects)</i></li> <li>• <i>Loans out (lending objects)</i></li> <li>• <i>Documentation planning</i></li> </ul> <p>You should plan to improve the accuracy and usability of documentation over time.</p> <p>You'll need to confirm that you've implemented the Spectrum primary procedures and that you have a manual outlining the step-by-step instructions for completing the procedures at your museum.</p> <p>You'll need to tell us whether you've completed the Spectrum standard for <i>Inventory</i> and if not, when you expect to complete this.</p>

If we ask, you'll need to provide your written documentation plan. If we visit you, we'll ask to see your documentation procedural manual and ask you to demonstrate the procedures in practice.

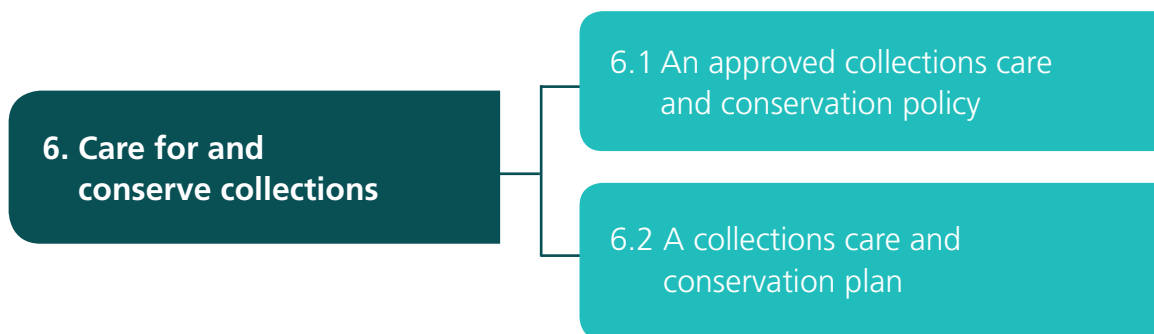


## What we'll look for

- We'll look at how you are implementing the primary procedures in the Spectrum standard
- We'll check that your documentation procedural manual is up to date
- We'll check if you've met the Spectrum standard for *Inventory* and if not, we'll want to know how you're planning to resolve an inventory backlog or backlogs. You'll be able to explain this in your documentation plan with timescales for completion
- We'll want to know how you intend to develop your collection documentation and that you have a written plan showing priorities and timescales as described in the Spectrum standard for *Documentation planning*

## 6 Care for and conserve collections

To meet the standard, you'll need to provide evidence that you have each of the following:



## 6.1 An approved collections care and conservation policy

All museums		
To meet the standard, you'll need	Why is this important?	What evidence is needed?
<p><b>6.1 An approved collections care and conservation policy</b></p>	<p>The policy or statement shows how your collections care and conservation activities ensure the long-term preservation of collections, link to your statement of purpose, and meet ethical commitments and legal requirements.</p> <p>The policy outlines the duty of care and responsibilities towards the collection.</p>	<p>Your policy or statement should be based on a combination of preventative and remedial conservation, both designed to ensure long-term preservation.</p> <p>The policy should cover:</p> <ul style="list-style-type: none"> <li>• Standards – the relevant standards and frameworks you use to look after your collections, for example <i>Benchmarks in Collections Care</i></li> <li>• Expertise – how you receive regular advice from conservation and collections care experts, whether in-house or freelance</li> <li>• Specialist collections - specific procedures for specialist collections, for example, working historic machinery or natural science collections</li> <li>• Communication – how the policy is communicated to your workforce, contractors and users</li> </ul> <p>The policy should be reviewed and approved by your governing body at least every five years.</p> <p>You'll need to provide a copy of your collections care and conservation policy or statement with signed approval. Your collections care and conservation policy may be part of your wider collections management framework, care and conservation plan, or in your forward or business plan, in which case tell us the document and section.</p>

# Managing Collections

There are two types of conservation:

- Preventative conservation covers the measures necessary to slow down or minimise deterioration of museum objects, and specimens and structures
- Remedial conservation involves a treatment to an object or specimen to bring it to a more acceptable condition or state to stabilise it or enhance some aspects of its cultural or scientific value

Where the operation of a museum has been outsourced to a third party there should be a clear relationship between the management agreement and the collections care and conservation policy. Arrangements for auditing collections condition against required standards should be clear in the management agreement. It's important that both parties have separately defined roles and responsibilities so that there's no duplication and it's clear who is responsible for different areas such as insurance, conservation and maintenance.

## What we'll look for

- We'll check that the policy is appropriate for your size and type of museum and proportionate with your wider forward/business plan and available resources
- We'll check that the policy fits with the statement of purpose and key aims of your museum
- We'll look at how appropriate the policy is for the types of material in your collections
- We'll check that you have outlined your arrangements for accessing appropriate collections care and conservation advice
- We'll check your policy has signed approval in place
- We'll check that the policy reflects the requirements of a management agreement (where museum operations are outsourced)
- We'll check that the policy covers a clear period and has been reviewed within the last five years

## 6.2 A collections care and conservation plan

	All museums	
To meet the standard, you'll need	Why is this important?	What evidence is needed?
<b>6.2 A collections care and conservation plan</b>	<p>Looking after collections is a long-term commitment. A collections care and conservation plan sets out your priorities and activities and the resources required to achieve them.</p>	<p>You'll be asked to confirm the areas covered by your collections care and conservation plan.</p> <p>You should have a plan to maintain and, where possible, improve your collections care over time. Priority should be established through regular review and assessment, covering the condition of the collections and the environment in which they're stored. The resulting recommendations will form the basis of an action plan which will establish priorities and timescales.</p> <p>The areas we will expect to see covered in your plan are outlined by museum type in this section.</p> <p>Your collections care and conservation plan may be a separate document or part of your wider collections management framework, or in your forward or business plan.</p>

## Independent museums – types 1-2

A basic conservation plan should include:

- An overview of current collections care and conservation
- An awareness of collection needs including vulnerable items and priorities for action with timescales
- Arrangements for building condition and maintenance to ensure that the building contributes towards providing appropriate environmental conditions for the different elements of the collection
- How you identify the main threats for collections on display and in store
- Arrangements for pest management, regular cleaning and inspection, appropriate packing and storage techniques, materials and equipment
- Arrangements for environmental monitoring, control and equipment maintenance for locations where you have collections
- What resources are available? Who does this, what training they receive and how you access professional conservation advice?

## Independent museums – type 3

## Local authority museums – types 1-3

## University museums – types 1-3

## National museums

## Nationally-styled museums

The plan should include:

- An overview of current collections care and conservation
- An awareness of collection needs including vulnerable items and priorities for action with a planned programme of remedial and preventative conservation work
- Arrangements for building condition and maintenance to ensure that the building contributes towards providing appropriate environmental conditions for the different elements of the collection
- How you identify the main threats for collections on display and in store
- What you have based your plan upon? For example, collections surveys such as *Benchmarks in Collections Care*
- Arrangements for pest management, regular cleaning and inspection, appropriate packing and storage techniques, materials and equipment
- Arrangements for environmental monitoring, control and equipment maintenance for locations where you have collections including frequency of monitoring
- What resources are available? Who does this, what training they receive and how you access professional conservation advice (whether in-house or contracted/freelance)?
- Arrangements for employing contract/freelance conservators
- Review periods and timetabled actions

If we ask to see it or we visit you, you'll need to provide your written care and conservation plan.

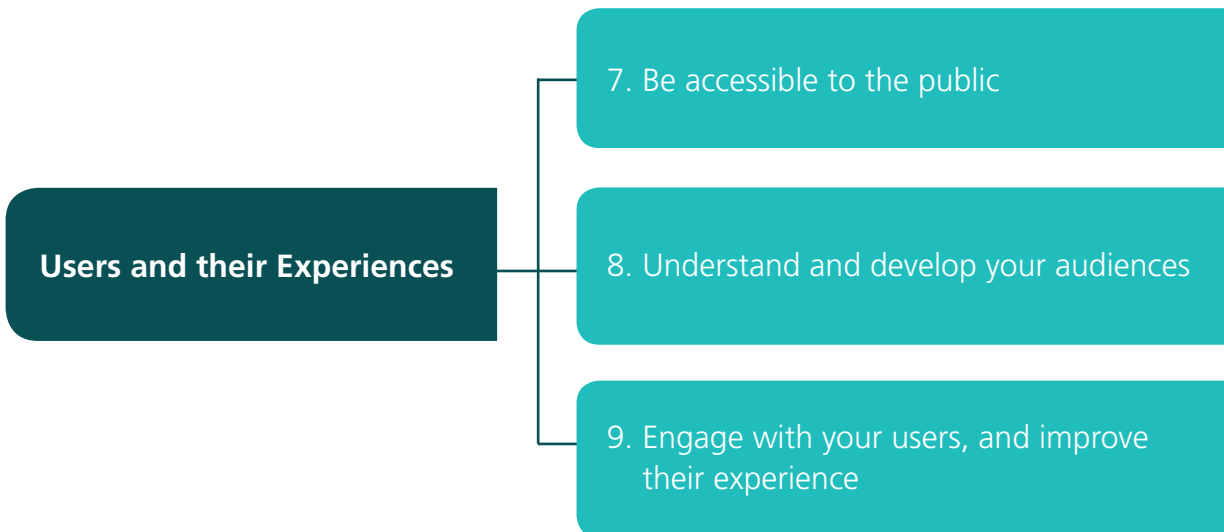
## What we'll look for

- We'll look at how appropriate the plan is to your museum's size and the composition of your collections
- We'll want to understand how your plan has been developed. What have you used to prioritise your needs or base your plans on?
- We'll check that the plan includes an overview of current collections care and conservation, has timescales, and identifies the people, equipment and resources available to implement your plan
- We'll check that the workforce and any contract workers involved in the care and conservation of the collection are aware of the plan and trained in its implementation

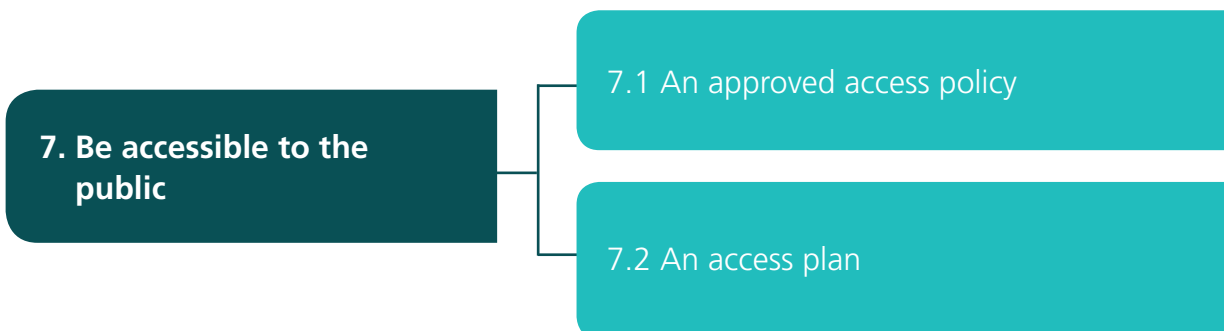
## Guidance notes for the Accreditation Standard requirements 7-9, Users and their Experiences

The final three requirements of the Accreditation Standard look at how you engage with your users. It covers how you make collections accessible to the public, how you understand and develop your audience and how you engage with them to give them a better experience.

Museums may cover aspects of 7, 8 and 9 within overarching policy documents relating to audiences and access. Your plans may be included in your forward or business plan or within a specific access, audience development or learning and engagement plan. In each case you'll need to reference the relevant document or section on the application form.



### 7 Be accessible to the public



## 7.1 An approved access policy

	All museums	
To meet the standard, you'll need	Why is this important?	What evidence is needed?
<b>7.1 An approved access policy</b>	<p>The people who use your buildings, sites, programmes, collections, and the associated information you hold on them, need to be able to access your services. This is an essential part of providing a service to your users.</p> <p>Your access policy or statement will show how your access provision links to your statement of purpose and meets ethical commitments and legal requirements.</p>	<p>Your museum should have an access policy or statement. This should be informed by an access assessment and developed in consultation with your users. Your access policy or statement is often an internal management document so it's not the same as visitor access information.</p> <p>The policy or statement will include:</p> <ul style="list-style-type: none"> <li>• How you identify the differing needs of users and provide access for them</li> <li>• Information about the range of interpretative methods you use to exhibit the collections</li> <li>• Information about how you enable public access to the collections, buildings and sites, and associated information</li> <li>• Consideration of the use of languages other than English, where this would make collections more accessible to local communities and visitors</li> <li>• How you will balance the care and management of collections against provision of access</li> <li>• The date you'll next review the policy</li> </ul> <p>You'll need to confirm the time period your access policy covers and provide a copy of your access policy or statement with signed approval.</p> <p>The policy should be reviewed and re-approved by your governing body at least every five years.</p>



## Independent museums – types 1-3

Your access policy should describe your organisational commitment to offer an inclusive service. You should outline how access is provided and what processes you have in place to evaluate, monitor, reflect and respond to users' needs and develop your collections, facilities and services.

## Local authority museums – types 1-3

## University museums – types 1-3

## National museums

Local authority, university and national museums must comply with the Public Sector Equality Duty and the Equality Act 2010.

In your policy or statement you should also include the standards you've used to develop your policy e.g. *PAS 197:2007 Code for cultural collections management*.

The Welsh Language Act 1993 establishes the principle of language equality and notes specific steps to be followed by public bodies such as local authorities, health boards and government agencies – including organisations outside Wales that provide services to people in Wales.

## Nationally-styled museums

This will relate to your appropriate governance type.

## What we'll look for

- We'll look at how the access policy has been communicated to stakeholders and users, for example if it is available on your website
- We'll check that the access policy links to and guides forward or business planning
- We'll look at how the policy covers all forms of access for example physical, intellectual, sensory, social, geographical, cultural and financial factors
- We'll look for how you've made provision of information in other languages in response to the needs of local communities
- We'll look at how your statement is shared so users and potential users can see it
- We'll check that the policy covers a clear time period and has been reviewed within the last five years
- We'll check your policy has signed approval in place
- We'll look at how your access assessment feeds into your access policy

## 7.2 An access plan

All museums		
To meet the standard, you'll need	Why is this important?	What evidence is needed?
7.2 An access plan	<p>To remain relevant to changing user needs and expectations you should plan to improve the physical, sensory and intellectual access to your collections, information about your collections and access to the buildings housing your collections – identifying priorities, timescales and resources.</p>	<p>The plan should outline priorities for action based on your access policy or statement and recommendations from your access assessment. The access assessment could include:</p> <ul style="list-style-type: none"> <li>• Access audit or access checklist</li> <li>• Work with focus groups, support agencies, advocacy groups, charities, experts</li> <li>• Facilities checklist</li> <li>• Review of interpretation and collections use</li> </ul> <p>The assessment can be carried out in-house or with external expertise. It should be carried out within the last five years, or more recently if there's been a significant change to your buildings or displays.</p> <p>Your plan will outline the procedures followed for:</p> <ul style="list-style-type: none"> <li>• Public access – including how you provide information on what is and is not available for public access; and how you provide access to collections both on display and in store and to information on the collections</li> <li>• Research – your procedures for handling research enquiries</li> <li>• Access to professional advice for your organisation – where you access support, obtain advice and help</li> <li>• Training for your workforce – how you ensure everyone is aware of access requirements</li> </ul>

All museums		
To meet the standard, you'll need	Why is this important?	What evidence is needed?... Continued
7.2 An access plan		<p>Public access provision could include:</p> <ul style="list-style-type: none"> <li>• Guided tours, including stores</li> <li>• Facilitated school or group sessions</li> <li>• Promotional events</li> <li>• Identification sessions</li> <li>• Website/online collections access</li> <li>• Research facilities and materials</li> <li>• Catalogues</li> <li>• Online resources</li> </ul> <p>Improving access to your buildings, sites, collections and collection information may include:</p> <ul style="list-style-type: none"> <li>• Improvements to facilities</li> <li>• Alterations to improve the accessibility of your building/site</li> <li>• Signage</li> <li>• Increasing access to collections in store</li> <li>• Loans to other organisations</li> <li>• Development of online resources</li> <li>• Handling collections</li> <li>• Temporary exhibitions</li> <li>• Learning resources, outreach, loans services</li> <li>• Collections tours</li> </ul> <p>You'll be asked whether you've had an access assessment in the last five years.</p> <p>You'll be asked to confirm the types of access you provide to users.</p> <p>You'll be asked to confirm the areas covered by your access plan and when the plan was last reviewed.</p> <p>Your access plan may be a separate document, within your forward or business plan or in an audience development plan.</p>

## National museums

## Nationally-styled museums

We'll also look at:

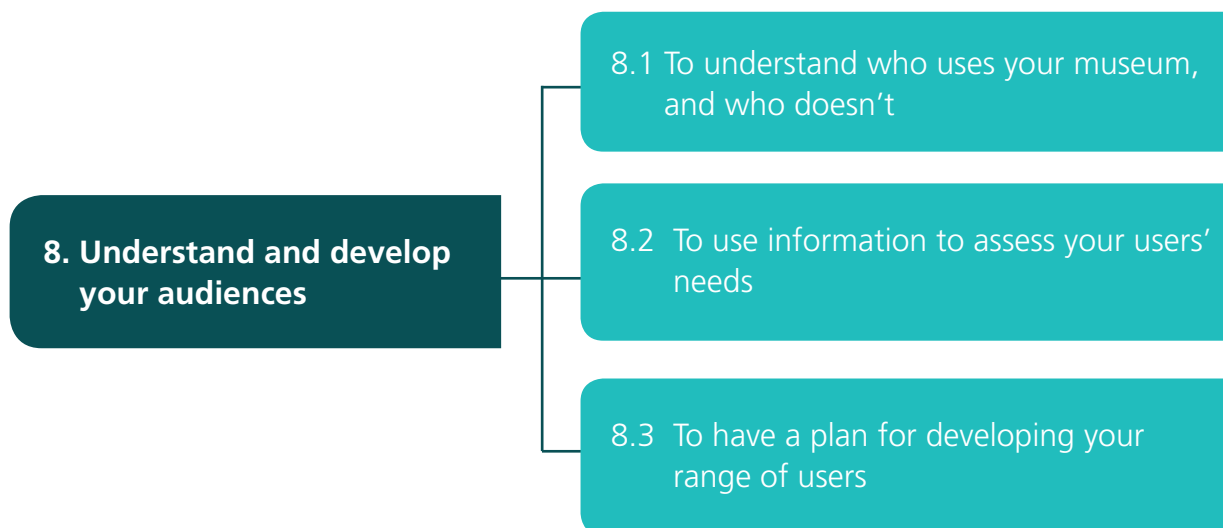
- How you support other museums working in similar fields
- Your research programme, what staffing arrangements you have to support research, and how research is published

## What we'll look for

- We'll check that the access assessment has been completed within the last five years
- We'll check that your access plan covers a clear time period
- We'll check what types of access to your collection you provide to users
- We'll check which areas your access plan covers
- We'll consider the balance of the permanent collection on display, and how you provide access to the collections which aren't on display
- We'll consider how you've prioritised and planned to implement recommendations from your access assessment

# 8 Understand and develop your audiences

To meet the standard, you'll need to provide evidence that you have each of the following:



## 8.1 To understand who uses your museum, and who doesn't

	All museums	
To meet the standard, you'll need	Why is this important?	What evidence is needed?
<b>8.1 To understand who uses your museum, and who doesn't</b>	Collecting information on who does and doesn't use the museum enables you to find out more about their needs and expectations, and helps you plan improvements to how you deliver your service.	<p>You should be aware of the breadth of current users and stakeholders, informed by audience data you have collected. You should also consult users and non-users on the services you provide and how their needs can be met.</p> <p>You'll need to confirm who your users and non-users are and what methods you use for data collection and consultation with them. For example, a visitor survey or questionnaire.</p> <p>You'll be asked to submit your current plans for improving your provision for existing users, and how you work with under-represented groups.</p> <p>Your plan may be a separate document, within your forward or business plan or in an audience development plan. If you haven't got a plan, you'll need to describe this on the form.</p>

### Independent museums – types 1-2

Consulting with your users and non-users needn't be costly or resource-heavy.

You may well already gather this information on a regular basis. You may have to formalise meetings by taking notes and recording opinions for use in developing your forward or business plan. You may also wish to undertake short visitor surveys or questionnaires to gather data.

## Independent museums – type 3

Larger independent museums should consider formal consultation such as regular focus groups from various sections of users and non-user communities.

You should standardise how you collect data across the museum, with specific and relevant categories of information identified and collected from across all museum activity.

Consider benchmarking your museum against similar organisations or looking at your own data over time to track progress.

## Local authority museums – types 1-3

### University museums – types 1-3

You should use the information you have on your current users and your understanding of the primary audiences for your museum to inform your forward or business plan and any wider strategic plans (such as learning, audience development, programming and collections access).

Use any guidance or requirements from your governing body when considering consultation processes and public engagement requirements.

You should standardise how you collect data across the museum, and your service, with specific and relevant categories of information identified and collected from across all museum activity.

Consider benchmarking your museum against similar organisations or looking at your own data over time to track progress.

## National museums

### Nationally-styled museums

You should use the information you have on your current users and your understanding of the primary audiences for your museum to inform your forward or business plan and any wider strategic plans (such as learning, audience development, programming and collections access).

Using a range of mechanisms appropriate to your users and non-users, national museums and nationally-styled museums should formalise any consultation they carry out. You should standardise how you collect data across the museum, and any associated sites, with specific and relevant categories of information identified and collected from across all museum activity.

Consider benchmarking your museum against similar organisations or looking at your own data over time to track progress.

## What we'll look for

- We'll look at your visitor figures over the last three years
- We'll check that your forward or business plan identifies current users of the museum
- We'll check whether the consultation with users and non-users is appropriate for your size and type of organisation, for example in relation to services provided and users' needs
- We'll look at your awareness of potential users and groups not currently accessing your museum

## 8.2 To use information to assess your users' needs

	All museums	
To meet the standard, you'll need	Why is this important?	What evidence is needed?
<b>8.2 To use information to assess your users' needs</b>	Analysing and evaluating information about your users helps you plan future activities and programmes.	<p>You should have processes in place to respond to user and non-user comments in the short and longer-term, analysing and evaluating these to plan improvements to your services.</p> <p>You'll be asked to confirm that you have processes in place.</p> <p>You'll need to show how your analysis and evaluation helps guide forward planning with reference to the relevant section of your forward or business plan.</p>



# Users and their Experiences

## Independent museums – types 1-2

We'll expect you to evaluate the user experience of the services you offer and to find out about any possible barriers to participation.

You should use the results to develop and improve your services. This is most likely to be referenced in your forward or business plan.

## Independent museums – type 3

## Local authority museums – types 1-3

## University museums – types 1-3

## National museums

## Nationally-styled museums

To evaluate your visitor/user experience activity you should include a range of analysis tools and incorporate a mix of quantitative and qualitative approaches.

You should use the results to develop and improve your services. This is most likely to be referenced in your forward or business plan.

## What we're looking for

- We'll look at how you evaluate and analyse collected information and data and how it is used to inform future planning
- We'll check that the analysis and evaluation is of a sufficient level of detail for your museum's size and type

### 8.3 To have a plan for developing your range of users

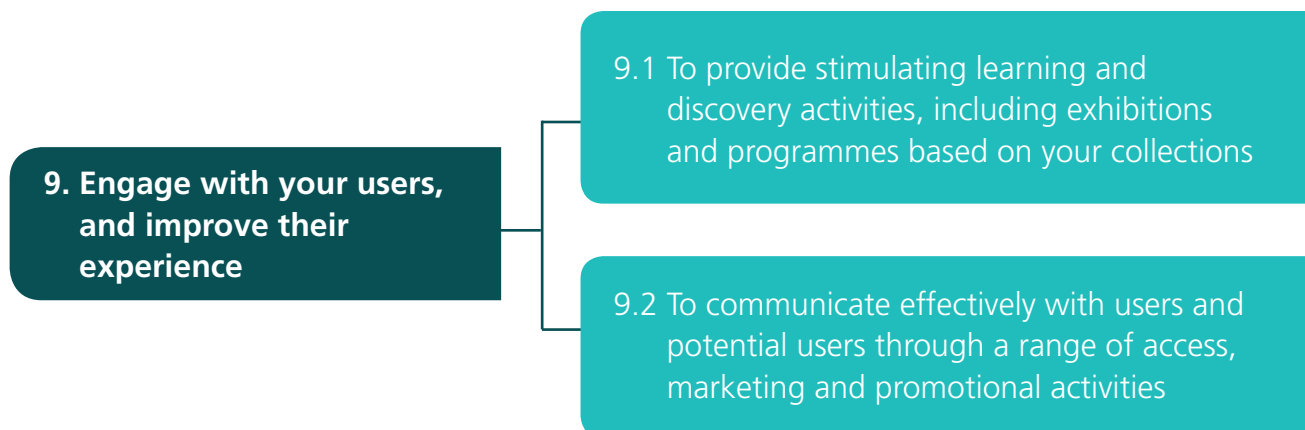
	All museums	
To meet the standard, you'll need	Why is this important?	What evidence is needed?
<b>8.3 To have a plan for developing your range of users</b>	Putting everything together in a plan to develop your range of users helps you to remain sustainable and relevant as an organisation, and responsive to user feedback.	<p>You should use the information you've gathered and evaluated to inform the development of plans to broaden the range of users and increase numbers where practical.</p> <p>These plans may be included in your forward/business plan or in wider strategic plans, for example an audience development plan.</p> <p>You'll need to provide your plan or show where your plans to broaden the range of users sit with reference to the relevant section of your forward plan or business plan and/or other relevant strategic planning documents.</p>

#### What we're looking for

- We'll look for what steps you've made to broaden the museum's current offer or provision to users and non-users
- We'll look for an understanding of why some potential audiences are not using the museum and what plans you have to remove barriers to participation
- We'll look at how you measure the success of your plans to increase participation

# 9 Engage with your users, and improve their experience

To meet the standard, you'll need to provide evidence that you have each of the following:



## 9.1 To provide stimulating learning and discovery activities, including exhibitions and programmes based on your collections

All museums		
To meet the standard, you'll need	Why is this important?	What evidence is needed?
<p><b>9.1 To provide stimulating learning and discovery activities, including exhibitions and programmes based on your collections</b></p>	<p>Having a range of learning and discovery activities will ensure that a broad range of people will be able to engage with your collections and programmes.</p>	<p>You should have a clear understanding of the role of learning for users in your organisation and that it is clearly communicated to and understood by your staff and/or volunteers.</p> <p>You will provide a welcoming and stimulating learning environment for users and support learning in a variety of ways, for example through talks, publications and learning resources.</p> <p>You should work with partners to facilitate effective learning experiences, for example special interest groups, local community groups, further education providers or adult learning.</p> <p>You'll be asked to confirm what activities you use to support learning and engagement.</p> <p>You'll need to show where your plans for learning and engagement sit with reference to the relevant section of your forward or business plan. This may be in other planning documents or supporting literature.</p> <p>If you choose to participate in VAQAS, VAQAS Cymru, VisitScotland Quality Assurance Scheme, Welcome Host schemes or similar you could tell us how this helps inform your planned improvements.</p>

## Independent museums – type 1

Your learning and engagement activities are likely to include some of the following:

- A programme of specialist lectures or talks
- Groups, self-led or guided tours
- Self-led learning opportunities
- Partnerships to support learning, for example on a basic level this might be a link with a local school or links with local community groups

## Independent museums – type 2

Your learning and engagement activities are likely to include some of the following:

- A formal education programme supported by learning materials
- A programme of specialist lectures or talks
- Groups, self-led or guided tours
- Self-led learning opportunities
- Partnerships to support learning, for example on a basic level this might be a link with a local school or links with local community groups

## Local authority museums – type 1

Your learning and engagement activities are likely to include some of the following:

- A programme of specialist lectures or talks
- Groups, self-led or guided tours
- Self-led learning opportunities
- Partnerships to support learning, for example on a basic level this might be a link with a local school or links with local community groups

## Independent museums – type 3

### Local authority museums – types 2-3

Your museum will support learning groups, subject specialist lectures and talks and have a formal learning offer for multiple educational and user groups including informal learning.

We'll expect to see evidence of a wide range of learning opportunities for different user groups incorporating different learning styles. You'll have well developed partnerships to support learning, that are relevant to the variety of learning offers at the museum.

You'll make visitor information available for group leaders.

### University museums – type 1

You'll have a formal learning offer within the university with regular subject specialist lectures and talks that are available to all potential users not just the university staff and students.

You'll work in partnership with various academic schools and departments, internal and external to your university and other learning providers, subject specialists and schools to ensure the opportunities for learning are as broad as possible.

### University museums – types 2-3

We'll expect to see evidence of a wide range of learning opportunities for different user groups incorporating different learning styles. You'll support learning in your museum across the workforce.

There'll be at least one paid member of staff with responsibility for learning (this could be a shared post). Learning staff should be represented within senior management teams and relevant workforce members receive regular training. Induction should feature learning at the museum.

There'll be a range of sophisticated partnerships to support learning, relevant to the variety of learning offers at the museum.

You'll make visitor information available for group leaders.

## National museums

### Nationally-styled museums

We'll expect to see evidence of a wide range of learning opportunities for different user groups incorporating different learning styles. You'll support learning in your museum across the workforce.

There'll be a number of learning staff at your museum, represented at senior management level and in project teams. Regular training should be available to those members of the workforce that need it, and your induction process should feature learning at the museum.

There'll be a range of sophisticated partnerships to support learning, relevant to the variety of learning offers at the museum.

You'll make visitor information available for group leaders.

You'll need to provide a copy of your museum display policy.

You'll need to tell us what research and facilities are available for users.

National and nationally-styled museums should publish user research in some form. You'll need to provide a breakdown showing how many people have used your research facilities in the last 12 months.

You'll need to attach a list of scholarly works your museum has published in the last three years.

You'll need to provide a copy of your published catalogue as an attachment or web link.

## What we're looking for

- We'll check to see how learning is supported by your museum and whether it is appropriate to your size and the scope of your collections
- We'll look at whether learning activities reflect your purpose and collections
- We'll look at whether or not learning resources reflect different learning preferences and whether or not you consult with a broad range of people to develop learning opportunities
- We'll check your digital and print media to see how learning opportunities are promoted and what information is made available to individuals or groups to facilitate their visit

## 9.2 To communicate effectively with users and potential users through a range of access, marketing and promotional activities

To meet the standard, you'll need	All museums	
	Why is this important?	What evidence is needed?
<p><b>9.2 To communicate effectively with users and potential users through a range of access, marketing and promotional activities</b></p>	<p>Keeping up to date with the best and most effective ways to communicate with your users ensures that they can engage well with your museum.</p> <p>Publicising access information online including useful practical information helps reassure visitors that they can access the museum and know what facilities to expect.</p>	<p>There will be a range of accessible and appropriate ways for users to access information on your services both in print media and via online resources such as a website.</p> <p>You should publish information on location, how to get to the museum, opening times, facilities and services including details of current exhibitions and programmes and access to collections.</p> <p>The information you provide should include what provision you've made for users with additional access needs, for example lift access or use of languages other than English.</p> <p>You'll be asked to confirm what information you provide with reference to print media and online resources.</p> <p>You'll be asked to upload supporting documents or provide links to relevant pages on your website in this section. If you have a marketing or communications plan you can include it. Other examples might include leaflets or posters to show us your promotional material.</p>



# Users and their Experiences

## National museums

## Nationally-styled museums

You'll need to tell us how you ensure the quality of your facilities, marketing and communications are appropriate to your size and scale and reflect your use of a national name.

### What we're looking for

- We'll ask for information on your opening arrangements to check your museum is a physical site/space/building which is open regularly and that there is access to the collection for a minimum of least 20 days per year
- We'll check what published information you provide online and in print media
- We'll look at whether you provide information in accessible formats including languages other than English and whether your website meets standard accessibility formats
- We'll check that you've published visitor access information
- We'll check that your website content is up to date
- In cases where restrictions are in place we'll look to see that you've made alternative arrangements so that users can access the museum's collections
- We'll check whether you have a dedicated phone number/email address for specific enquiries
- We'll look at whether you use different styles of communication to reach different groups of potential users
- Where applicable, we'll look at whether your name is appropriate to your size and scale and reflects the quality of your facilities against other nationally styled and national museums

**At the end of the online application or return form you'll be asked if you'd like to share any significant achievements over the last few years. This helps your assessor highlight any key successes to the awarding panel.**

# How your application will be assessed

## New applicants

If you're a new applicant for Accreditation, you'll need to submit an application within the three-year Working Towards Accreditation period outlined in your confirmation of eligibility letter.

We'll assess your application for Accreditation against the Accreditation Standard, including a site visit.

If your museum meets the standard, an assessment of your application will go to an Accreditation panel for an award decision. If it's your first application for Accreditation, you'll need to demonstrate you've met the standard requirements in full. New applicants to the scheme can only achieve Full Accreditation. Provisional Accreditation status is not available as an award outcome.

If you've not met the standard, your assessor will give you feedback. This will outline which requirements you've not met. You will need to work on these first if you still wish to continue. Depending on how much work you have to do we'll decide whether or not you'll need to start again with a new application. If we aren't able to take this forward, we'll explain why and give you clear and supportive guidance on what you need to do to achieve Full Accreditation.

If you are still committed to achieving Accreditation and able to respond to the assessor feedback you can submit an amended application at any time within your Working Towards Accreditation period.

## Accreditation returns

Once your museum is Accredited you'll need to provide evidence that the museum still meets the standard. This is called an Accreditation return. This gives you the opportunity to review the information you've sent us and to tell us about any changes you've made.

The cycle for returns is every five years. You can check when your next return is due from the Accreditation return schedule published by your assessing organisation. You'll receive an invitation letter from your assessing organisation six months before your submission deadline.

As you're approaching your review date for an Accreditation return, you'll need to make sure that your policies and plans are up to date and compliant with the Accreditation Standard and that you've provided updates on any areas for development you may have received. These areas for development will be highlighted in your previous decision letter and in the invitation letter. If any activities have been delayed, discontinued or revised just let us know with a brief progress update.

## Returns deadlines

Your assessing organisation has published a returns schedule so check online for the date of your invitation and return deadline. We know a lot can change since your last return so if you think you'll have difficulty with completing your return in time please contact us well before the deadline, so we can look at other options for you.

We'll suggest options, agree next steps with you and confirm any agreed extension in writing. If you've deferred and you still can't provide a return, we'll ask for some basic information and we'll likely recommend an award change to Provisional Accreditation. At the end of this we'll still expect you to provide a full return.

If you don't provide a return by the agreed deadline and we don't hear from you, we may change or remove your Accredited status.

# The assessment process

Once you've submitted your application (or return application):

- Your assessor will make an initial desk-based assessment, which may include further requests for additional information
- This might include those documents which aren't uploaded as part of the online form but are available on request. It may also include more documentation around statutory or legal requirements for example safeguarding policies
- In making your assessment, your assessor may call on the knowledge of, or have discussions with, other relevant advisory officers for their input
- If you're a new applicant, you'll receive a site visit from us as part of your assessment. We may visit your museum as part of the assessment where significant change, such as major development, has occurred at the museum since the last full assessment, or where a museum has not been visited for a number of years. Each assessing organisation manages their own programme of visits
- We also visit a sample of the returning museums. More information about planning for a visit can be found on the website of your Accreditation assessing organisation
- Once we've completed your assessment, it'll be sent to the Accreditation moderator at Arts Council England. This is to check for consistency and is part of our quality assurance process. We may ask for additional information at this stage. This is the final check and confirms that your museum is scheduled to an awards panel
- We may take up to six months to complete the assessment process, depending on whether you've provided all the documents and evidence we require. The final step is to consider your assessment at a scheduled Accreditation panel, who'll make a final decision on your museum's award

# What types of assessment are there?

Assessment type	What this means?
<b>Eligibility questionnaire</b>	To check whether your museum is eligible to apply. If confirmed, you will be formally Working Towards Accreditation.
<b>New applications</b>	You're applying to the Accreditation Scheme for the first time, after a period of non-participation or at the end of a five-year period following an award decision to remove and exclude for deliberate non-compliance. To decide whether to award your organisation Accreditation status.
<b>Accreditation returns</b>	We ask all Accredited museums to update us, at least every five years, on how they are meeting the Accreditation Standard. The reason that we're asking for an update is that Accreditation is an agreed standard, which demonstrates how museums manage their collections properly, engage with visitors, and are governed appropriately. We'll use this information to check whether you are still meeting the purpose of the Accreditation Scheme and the requirements of the standard. We'll confirm whether you retain your Accreditation award following the decision-making panel.
<b>Provisional review assessments</b>	You have received a Provisional award and have outstanding required actions to address within an agreed timescale. When you have completed these we'll assess again and go back to an Accreditation panel to make an award decision.
<b>Significant change reviews</b>	You're undergoing or expecting any significant changes that may impact on your museum's compliance with the standard. You'll be asked to provide an update and we'll use this information to decide whether we need to go back to an Accreditation panel to make an award decision.
<b>Compliance reviews</b>	To decide if you do not fulfil the purpose of the Accreditation Scheme, meet the requirements of the standard or continue to meet the terms and conditions of the scheme through the duration of the organisation's Accreditation award.

# Who makes the award decision?

The UK Museums Accreditation Committee makes all decisions to award and remove Accreditation status. A sub-group of the Committee form a panel to make all decisions on applications and returns. The Museum Accreditation Committee is recruited and selected by the UK Accreditation Partnership and formally appointed by Arts Council England. The purpose of the Committee is to oversee

the effective and consistent operation of the Accreditation Scheme for museums and galleries in the UK. The Committee acts as a representative of the museum sector in the UK in its overview of the Accreditation Scheme for museums and galleries.

Award decisions are not made by your individual assessor or by the Accreditation moderator at the quality assurance stage.

# What are the possible decisions that panels can make?

Award outcome	What this means	Scenario
<b>Full Accreditation</b>	You've shown how you meet the Accreditation Standard and are actively addressing any areas for development	
<b>Provisional Accreditation</b>	<p>You've met the majority of the Accreditation Standard but haven't been able to meet all the requirements. You're actively working on outstanding required actions within a set timescale</p> <p>On satisfactory completion of these required actions, we'll return to an Accreditation panel with a recommendation for Full Accreditation status</p> <p>This award decision is not available to museums who are new applicants to the Scheme</p> <p>If your museum is Provisionally Accredited you hold an Accreditation award</p>	If you're undertaking a major redevelopment or experiencing organisational change this is a common outcome

Award outcome	What this means	Scenario
<b>Deferred decision</b>	The panel have asked for additional information before making an award decision	
<b>Remove</b>	<p>You are no longer an Accredited museum</p> <p>Where a museum is removed we'll let you know the reason and signpost appropriate support and guidance</p> <p>Removal from the scheme isn't the same as being removed and excluded</p>	<p>There are a number of reasons why it might not be appropriate for you to continue participating in the scheme:</p> <p><b>closure:</b> the collection has been transferred elsewhere</p> <p><b>change of function:</b> ineligible for participation, no longer a museum</p> <p><b>serious disaster:</b> for example, a catastrophic fire – no longer in a position to continue as a museum</p> <p><b>merger:</b> combined with another organisation delivering similar objectives that is already participating within the scheme</p> <p><b>capacity:</b> you're not able to meet the standard and you haven't taken action to progress to full status</p> <p><b>withdrawal:</b> you've chosen to voluntarily withdraw and so are removed from the scheme in line with your own instructions</p> <p><b>failure to provide a return:</b> you've not provided a return to the assessing organisation promptly with information we reasonably required about your organisation relating to Accreditation</p> <p><b>failure to comply with terms and conditions:</b> you've not met the terms and conditions for the Accreditation Scheme for Museums and Galleries in the United Kingdom: Accreditation Standard</p>

Award outcome	What this means	Scenario
<p><b>Remove and exclude due to deliberate non-compliance</b></p>	<p>This decision applies when a museum or its governing body have made an irreversible decision or action which goes against the shared ethical basis of the scheme by contravening the standard. An Accreditation panel will have agreed this status following the receipt of a recommendation for removal and exclusion from an assessor</p> <p>Excluded museums will not become eligible for Accreditation for a minimum of five years from effective decision date of the panel</p> <p>Excluded museums may apply for consideration of eligibility to the relevant assessing organisations five years after their removal for non-compliance</p> <p>Museums continuing to deliberately contravene a requirement or requirements of the scheme are not eligible to reapply. When applying again you'll need to demonstrate that compliance has taken place for the preceding five years and that former non-compliant issues have been addressed through appropriately amended and compliant policies, plans and procedures</p>	<p>You've undertaken unethical conduct, including but not limited to the unethical sale of museum collections</p>

## How long does it take?

Our target turnaround is six months for the assessment process from your submission. If we don't have a complete application and everything we need for our assessment this might take longer. Sometimes we'll want to come out for a site visit too, so we'll agree dates for this. We'll schedule your case to an appropriate panel and your assessor will let you know when everything's ready and confirm this date with you.

The award effective date is two weeks after the date of the awards panel as this links to the publication date of the official statistics.

We will formally notify you of the panel's decision as soon as we can once the meeting minutes have been approved, and within two weeks of the panel meeting at the latest.

## Your award letter

Your award outcome letter describes any recommendations agreed by the decision-making panel. If the panel has awarded Full Accreditation, we'll provide an award certificate.

You'll also receive a copy of our terms and conditions for the award and need to confirm your acceptance of these.

## How long does the award last?

Your award of Full Accreditation will last for five years, after which you'll be invited to provide a return application for assessment.

Museums holding Provisional Accreditation sit outside of the published returns cycle as they need to respond to the identified required actions by an agreed timescale instead (usually a short-term deadline of 12 months).

An award of Provisional Accreditation lasts for 12 months in the first instance. If we've set required actions this means you've outstanding areas to address before you can achieve Full Accreditation. These are priority actions with a shorter-term deadline.

If you're able to address any outstanding actions sooner than the full 12 months that's fine and you can submit whenever you're ready.

Provisional status can be re-awarded after the initial 12 months for the same issue, such as a major physical redevelopment or governance change. There may also be situations where a museum might resolve the initial issue that resulted in that award, only for a new and different issue to be identified through assessment. In these circumstances the museum may once again be awarded Provisional Accreditation for 12 months due to this new and different issue.



### Promoting your award

Once you've received your outcome letter notifying you of your Accreditation award it's up to you how you choose to publicise your achievement. We love hearing your success stories so do share your photos, cuttings and tweets if you wish.

Copies of the Accreditation logo (including

logos in English, Welsh and Scots-Gaelic) and Museum Accreditation Scheme brand guidelines are available from your awarding body for use on your publicity material and your website.

We publish an updated list of Accredited museums and a statistical report after each panel on the Arts Council website.

### What to do if you're experiencing significant change

If you're undergoing or expecting any significant changes that may impact on your museum's compliance with the standard, you'll need to let your relevant assessing organisation know. Do contact us promptly and don't wait until your next return is due. We're here to help and advise on next steps so don't be afraid to get in touch.

Tell us about any significant factors that might affect services to the public. The types of situations which might be considered as significant changes (not exhaustive) include:

- Short-term unplanned workforce change/challenge
- Unplanned museum closure
- Longer-term workforce restructure
- Major capital development
- Governance changes
- Change to the status, ownership or constitution of your organisation
- A proposal to sell items from the collection
- You are likely to enter into administration, liquidation, receivership, dissolution or, in Scotland, have your organisation's estate sequestrated

In this situation we'll usually ask you for additional information such as a brief summary

report. We might roll this into your next return if it's coming up soon or we may take you forward to panel earlier if we need to do an interim 'significant change' review. We'll often recommend a change to Provisional Accreditation whilst you're working through change. Overall, we aim to achieve the best possible outcome for you and provide support through the scheme. We are flexible and can signpost next steps, appropriate guidance and support if you're having difficulties or aren't sure what to do.

We'll usually ask you to provide the following information:

- A brief situation report
- A copy of your current forward planning document (or confirmation of situation)
- A copy of your current collections development policy (or confirmation of situation)
- The date when your emergency plan was last reviewed
- The date of your most recent security review

Museums undergoing redevelopment and that are closed to the public for longer than six months will be reviewed as a significant change assessment, considered at an awards panel and usually awarded Provisional Accreditation status.

### Financially-motivated disposals

Financially-motivated disposal is considered a significant change for an Accredited museum due to the reputational risk attached to an inappropriate sale both to the individual museum, the wider sector and also to the scheme as a whole.

Accredited museums considering a financially-motivated sale, or a disposal by

sale that might be viewed as financially-motivated, should follow the process set out in their approved Accreditation-compliant collections development policy and the Museums Association *Disposals Toolkit* 2014. If your museum governing body is considering undertaking a financially-motivated disposal you should request advice from the relevant assessing organisation.

### Hosted museums

Where a museum participating in or wishing to apply for Accreditation is hosted within the premises of another museum, and where an agreement exists for shared services and/or responsibilities, the host museum is

expected to be part of the scheme and hold the Accreditation award. If a panel decides to remove the host museum from the scheme, then we'd also want to check the continued compliance of the hosted organisation.

### What to do if you no longer wish to participate

If you decide to withdraw from the scheme, get in touch with your Accreditation assessing organisation. We can offer help and advice and welcome your feedback. If you choose to leave, we'll ask you for written confirmation of your decision showing this request has been approved by your governing body. We'll ask for a brief situation update explaining why you've decided to leave. Let us know if there are any risks to your collection or premises.

If your governing body manages more than one Accredited museum and closes an individual site, we'll expect the collections from the closed site to remain managed and cared for in line with the standard.

We'll take your request to a panel to formally remove your museum from the scheme and we'll confirm this outcome in writing.

If at a later point you decide you're interested in applying for Accreditation again, you'll need to start from the beginning by completing an eligibility questionnaire.

### Terms and conditions

It is important museums are able to maintain the Accreditation Standard during the lifetime of the award and you're aware of the need to comply with the terms and conditions for the Accreditation Scheme for Museums and Galleries in the United Kingdom: Accreditation Standard. You must contact your assessing organisation promptly if any of the situations described in the terms and conditions have occurred or are likely to occur.

Copies of the terms and conditions for participation in the Scheme form part of the declaration when you upload your application or form on the online system. We'll also send a copy to you with your award certificate and award outcome letter which you'll need to accept to confirm your award.

### Feedback and complaints

We welcome your feedback so that we can continue to develop the Accreditation Scheme and help with any difficulties you may encounter. Please send any comments or suggestions to your Accreditation assessing organisation.

If you're still not happy with the service you've received, there is a complaints

procedure for you to use. This explains the formal procedure for dealing with complaints and the sorts of things you can make a formal complaint about. We recommend firstly contacting the appropriate partner in the country where your museum is based to see if your concerns can be addressed before making an official complaint.

# Freedom of information and data protection

We are committed to being as open as possible. This includes being clear about how we assess and make decisions on Accreditation applications and returns and how we will use your application form and other documents you give us.

We will not release any information about applications during the assessment period, as this may interfere with the decision-making process. We may share information with external assessors acting on the behalf of Accreditation assessing organisations to help us assess

your application as well as Accreditation Mentors, Museum Development providers and Accreditation Advisers so we can signpost appropriate advice and support during your assessment. After we reach a decision, we will tell them the outcome of your application and if applicable, why this wasn't successful.

We will add your museum to the published list of all successful applicants once the process is complete. For more information about use of your data refer to your relevant assessing organisation.

## Review

The guidance documents are reviewed and republished regularly (usually annually) to ensure they remain current and relevant.



**MUSEUM**  
ACCREDITATION

---



Llywodraeth Cymru  
Welsh Government

