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# Accreditation Scheme for Museums and Galleries in the United Kingdom: Museum mentor handbook

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Based on work undertaken by Alison Bodley and Emma King



## Section one - becoming a mentor

### 1.1 What is a mentor and why are they needed?

The Accreditation Scheme sets nationally agreed standards for museums in the UK. The Standard supports museums in identifying opportunities for further improvement and development. Accreditation began as the Museum Registration Scheme in 1988, initially with an emphasis on ethical governance and collections management.

The development of a pool of advisers to provide smaller museums with access to professional curatorial support was one of the most successful and popular achievements of the Registration Scheme. The advisory role continues to be highly valued, but has become far wider in scope since 1988, a change evident within the 2011 edition of the Accreditation Standard. Due to this broadened reach, and the non-curatorial advice required, the term 'curatorial adviser' has been changed to the more accurate title of 'mentor'.

To fulfil the requirements of Accreditation all museums must have access to appropriately qualified professional staff. This can be through employing qualified and/or experienced staff or, if this is not possible, through the mentor scheme. Mentors work in partnership with museums, and local museum support services to ensure the museum has access to the advice it needs.

A mentor is a professional adviser who supports a museum in developing its Accreditation application and subsequent Accreditation returns. Mentors play a vital role in supporting and helping to develop museums which do not have qualified and experienced professional staff. For some people the mentor role forms part of their job description while for others it is a purely voluntary role.

### 1.2 The mentor role

The mentor supports governing bodies without paid professional staff to develop their service while working to the Accreditation Standard.

Museum Accreditation covers all aspects of a museum's business and it is unlikely that a single person will have the full range of professional skills to advise on all areas of the Standard with the same level of expertise. One museum professional must fulfil the role of mentor in order to sign off the museum's Accreditation application. That does not mean that they have to work alone. Mentors come from a range of backgrounds and may invite colleagues to help on specific areas or bring relevant expertise into the museum in other ways. The mentor needs to be aware of and co-ordinate, when appropriate, the advice that the museum is receiving. The mentor:

- provides support and advice relating to Accreditation from their own expertise.
- confirms the Accreditation application and Accreditation return, and provides a report as part of the Accreditation return.
- works with the museum to establish what other areas of expertise are required to meet and maintain Accreditation standards.
- acts as an 'advice co-ordinator', identifying sources for advice from their own networks or through other professionals.
- acts as an advocate for the museum and helps the museum to develop links and relationships with the wider museum profession.

Mentors should be an impartial, external source of advice. Therefore members of the museum's governing body are not eligible to act as the Mentor. If a mentor wishes to join a Board of Trustees, they should first resign their role as mentor and support the museum in finding an alternative candidate to act in this role.

In some areas a local museum support structure may exist, with museum support officers/teams present. Professionals within these roles may be eligible to act as mentors, although it may not always be appropriate or possible for them to undertake this role.

Staff of the Accreditation assessing organisations cannot take on the role of mentor in their own geographical areas to avoid the risk of conflicts of interest. Mentors should keep their skills up to date. If for some reason you leave the profession and are not involved in some other museum role, or actively continuing with continuing professional development (CPD), you should stand down after three years.

### 1.3 What qualifications or experience do I need?

Becoming a mentor is something to should be considered by museum professionals with reasonable experience and can be used to help mid to later career development. It is not suited to professionals at entry level. Museum professionals either employed in museums or actively involved in another museum-related role are eligible.

The qualifications required for professional advice are defined in the Accreditation requirement 1.8 within the Assessment Guidance document. The expectation for mentors is similar, but a greater emphasis is placed on substantial museum experience to enable effective and expert advice to be offered. To be a mentor you need:

- a minimum of five years experience working professionally in museums, with recent experience at curator/manager level. At least three years should be in an area of competence relating to Accreditation: organisational health, collections, or users and their experiences.
- a relevant or linked qualification, which can include a higher degree or diploma in Museum Studies, the Associateship of the Museums Association (AMA) or vocational degrees.
- a commitment to career-long CPD. This could be through participation in formal CPD channels, such as the Museums Association's AMA and CPD+ schemes, or through logging their CPD activity on their CV.

### 1.4 The role of the assessing organisation

The assessing organisations for Accreditation are:

- **England:** Arts Council England.
- **Wales:** CyMAL: Museums Archives and Libraries Wales.  
(a division of the Welsh Government)
- **Scotland:** Museums Galleries Scotland.
- **Northern Ireland:** Northern Ireland Museums Council.
- **National museums:** Arts Council England.

The assessing organisation assesses the museum's Accreditation application or return. They also have the final decision on whether a museum professional is suitable for the mentor role.



## 1.5 How do I become a mentor?

It is the museum's responsibility to recruit a mentor. They may have help in recruiting and brokering the relationships with their mentor from one of the following people in their local area:

- local support officer/team (e.g. local authority museum service).
- accreditation officer.
- an experienced mentor.
- an Accreditation assessing body.

If you don't already have contact with a museum that needs a mentor then contact someone in one of these roles to find out what opportunities there are.

## 1.6 Can I be mentor to more than one museum?

Yes you can, but ask yourself if you have the capacity to give advice to more than one museum. A mentor should expect to:

- conduct an annual Accreditation review.
- attend at least one trustee meeting.
- visit the museum at least once (meeting staff).
- attend a mentor networking meeting (or otherwise show continuing commitment to CPD relevant to the role).

Mentors should also expect to be called upon for occasional support and advice through email or telephone. **The total anticipated commitment may be up to four days per year.**

## 1.7 How do mentors work with local support teams?

The focus of the mentor role is based around the Accreditation Standard. Local support officers/teams often work with a large number of museums and will have a remit wider than Accreditation, such as partnerships, development, networks, events, as well as providing a local and/or regional overview. Some local support officers/teams have a mentor function, particularly in areas where fewer museum professionals are available to become mentors.

Mentors develop long term relationships with their museum over a number of years and support its ongoing development. The local support officer or team may also have an ongoing relationship, but is more likely to work with the museum on specific projects. Often the mentor is the only museum professional that has ongoing access to the Trustees and therefore provides a key function in addition to support for Accreditation.

Although there is no management relationship, local support officers and/or teams may be one of several partnerships available to help to induct the mentor into their new role and this should be the start of an ongoing relationship.

Museum structures vary across the UK but ideally the role undertaken by local support officers and/or team and mentor should join up, complement each other and fit closely together, providing the best support for the museum. Developing a good working relationship where each person knows what they are doing is the best way to achieve this, but this will depend upon the capacity of local officer and/or team and the mentor.



## **Section two - starting and reviewing the mentor role**

### **2.1 Assess your skills and what you can offer the museum**

First, assess your own skills against the Accreditation Standard. It is likely that you will have strong skills in some areas and weaker skills in others. The Accreditation Skills Assessment Tool template will help you do this. (See Section four)

### **2.2 Submit your application and CV**

Museums must have 'effective employment and management procedures for both paid and volunteer staff' (requirement 1.8). This means they need to have a system for recruiting a mentor with the appropriate experience and skills. Before approaching a potential mentor, museums should identify what they need from the mentor role. Recruitment will be conducted by the museum following their normal workforce recruitment processes, which may include the completion of an application form and/or the provision of a CV.

### **2.3 Meet with museum staff and trustees you hope to work with**

This is an opportunity for you to find out more about the museum and for them to find out more about you. The first meeting should be informal; it is not an interview as this is not a competitive process. Ideally the meeting should include:

- tour of the museum.
- tour of stores.
- opportunity to meet the key person you will be liaising with on a regular basis.
- opportunity to meet a trustee.

On this visit, ensure you understand what level of support the museum needs and establish with the museum whether you have the skills they need.

### **2.4 Establish a working agreement with the museum**

Work with the museum to draw up an agreement that sets out how you will work together. A template is available for you and the governing body to adapt. This document is important as it will clarify your role so that expectations are appropriate and clearly outline what the museum needs from you so that you can use your time as effectively as possible. You should agree on practical issues such as when and how you prefer to be contacted (working hours versus evenings and weekends; personal or work email address etc). This is also a document you can refer to if your relationship should break down for any reason. When this is completed then the Trustees should agree its adoption at their next Trustee meeting, recording the decision in a formal minute. The agreement should be renewed every two years at the same time as the Accreditation return.

A copy of the signed agreement between the museum and mentor, along with a copy of the minutes from the meeting approving the agreement should be provided to the assessing body. This information will be held in accordance with the Information Policy of the assessing organisation in compliance with the Data Protection Act 1998.



## 2.5 Induction

There may be several parts to an induction process:

- visiting the museum to undertake the first Accreditation review.
- meeting the local museum support officer and/or team (if present) or an experienced mentor/Accreditation Officer.
- contacting the assessing body.

These activities meetings should take place within six months of you being appointed as mentor.

### **Visiting the museum to undertake the first Accreditation Review**

The museum should induct you in the same way they would a Trustee. Make sure you see all the key documents which form part of an Accreditation application/return such as the forward plan, collection management plans and handbooks, and the emergency manual. Next, consider where the museum is within Accreditation and find out what advice staff and volunteers are likely to require over the coming year. Use the *Accreditation Review* procedure to review where the museum is in relation to forward planning and the Accreditation Standard. Together, work out what advice is needed and where it is going to come from. Remember you don't have to provide all advice yourself, but you should help the museum find the advice they need. Take this opportunity to plan your engagement with the museum over the coming year or let them know when you will not be available due to professional or personal commitments.

### **Meeting the local museum support officer and/or team (if present) or an experienced mentor, and an Accreditation Officer**

You can either meet the local support officer and/or team and Accreditation Officer with the museum or separately. It is likely that the support officer/team and Accreditation Officer will be able to give you more information about the museum and its local and regional context. It is important that you understand each other's role and what skills you both bring. You should:

- discuss your respective roles.
- talk about any issues of concern you may have.
- find out how they can support your museum.
- find out how they can help source additional support the museum may need.
- if the museum has given permission, share the contents of the Accreditation Review document so that they are aware of the museum's needs in relation to Accreditation. They may be able to support this through training.
- agree how you are going to keep in contact.

If there is an overlap in roles, make sure you both work to your strengths; the idea is to ensure the museum gets the best support possible.

You and the local support officer and/or Accreditation Officer should establish your own way of working but you could consider the models below:

- **Local Support Officer/Accreditation Officer as trouble shooter**

The mentor develops an ongoing relationship with the museum. They are aware of the museum's developmental needs. If there is an issue requiring additional support or expertise the local support officer/team and/or Accreditation Officer is invited to attend and support.

- **Local Support Officer/Accreditation Officer and mentor as collaborators**

This approach works well if the museum is involved in a particularly intense period of development or is in a critical situation. The mentor and local supporter officer/team and/or Accreditation Officer join forces to support the Trustees and staff. To share the load they identify key meetings where more support is needed and ensure that one of them is present. They feed back to each other and monitor the situation. They establish a way of reducing the museum's dependency on them, and gradually step back as the situation is resolved or improves.

- **Local Support Officer/Accreditation Officer as an additional adviser**

Many support/Accreditation Officers also act as additional advisers to the museum. This can work very well, but you both need to have established what each other's roles are so that you avoid duplication. Use the *Accreditation Review* document to help you.

If your area does not have a local support officer/team you should meet with an experienced mentor or Accreditation Officer and contact the assessing body.

### **Contacting the assessing body**

This step is crucial in all cases to ensure that you can access support and advice you may need while undertaking the role of mentor. Ensuring you are known to the assessing body and signed up to their information bulletins and events programme will link you to other mentors. This will also provide you with development opportunities to support the museum you advise, your employer and your own professional development. It is recommended that mentors, with the agreement of their advised museum, keep the assessing organisation up-to-date with any specific needs at the museum to support the development of training and support opportunities.

## **2.6 Work with your museum**

Support the museum through visits, emails and phone calls. Research has shown that mentors can assume a potential commitment of up to four days a year which should include a minimum of two visits:

- annual review visit.
- attendance at a Trustee meeting.
- visiting the museum while it is open to the public.
- Annual General Meeting / other events.

Be prepared to spend more time with your museum in the first year as you get to know it. The mentor role is advisory, however, there may be times when you will get more involved, provide more support or help deliver something practically. These instances should be time limited and not become a long term.

The mentor/museum relationship is a two-way process. You need to:

- communicate with the museum. There are no rules, but make sure you call or email regularly.
- be available, as appropriate and as agreed within the mentor agreement.
- keep yourself up to date with current professional standards and know how to access further advice and information.
- be an advocate for your museum and encourage them to engage with the wider museum community.
- develop a good relationship with the museum.





It is up to your museum to:

- appoint you.
- consult you and use you effectively.
- invite you to trustee meetings with due notice.
- develop a good relationship with you.
- keep you informed through:
  - trustee minutes.
  - other relevant committee minutes.
  - general mailings and information.

## 2.7 Conduct an annual Accreditation review

Together, you and the museum should undertake an annual Accreditation review. This will help to make the forward plan a living document, keep you in touch with the museum's progress as well as enabling you to plan the time you will work with the museum. For many museums this will merely be a health check and part of the museum's planning process. The process provides a framework in which the mentor can operate. With the museum's agreement you can include the local museum support officer/team or the Accreditation Officer which will support planning for training events.

## 2.8 Contribute to the Accreditation return

Every two-three years the museum will be asked to provide an Accreditation return, undertaking a formal review. As part of this process you will be asked to write a report outlining your engagement with the museum, and your view regarding the museum's compliance with the Accreditation Standard. Your report will be considered by an Accreditation assessor in the context of the Accreditation return assessment.

Completing a Accreditation review with the museum will inform your report and provide an opportunity to review your relationship with the museum. This is a good opportunity to revisit and renew or reaffirm your formal agreement to ensure that the relationship is working for both sides.

### Keeping a log

You may find it useful to keep a log of how you support your museum. This could be as part of your own CPD, to evidence your activity to employers, to assess how much time you are giving, to evidence volunteer time for a funding bid, or just to keep track of development. A template mentor log is provided.

If you are interested in using the mentor role for your own CPD development then you may find documents from the Museums Association's Associateship scheme useful:

[www.museumsassociation.org](http://www.museumsassociation.org)

## **Keeping yourself up to date**

It is your responsibility to keep yourself up to date with professional developments and you should take advantage of training opportunities in your area. When you take on the role of Mentor you also take on the commitment to undertake some kind of CPD in relation to this role.

## **2.9 Ending the mentor role**

At some point you will leave the role. There are a number of reasons for this:

- your skills and the museum's needs may have changed.
- you feel you have "done your bit".
- you are changing job.
- it is three years since you left the profession, and you are not involved in some other museum role, or actively continuing with CPD.
- the museum has employed a museum professional.

There is no time limit to being a mentor and indeed many mentors have been with their museum for many years. Mentoring roles often develop into excellent working relationships that provide benefits to the mentor and stability for the museum. If you are a mentor for more than four years with a museum then you should review with the museum their current needs. You may find that there is still a match, or alternatively it may become clear that the museum could benefit from a mentor with a different focus and skills set.

When you leave you should give the museum as much notice as possible, at least one month. If the role was part of your job role then your employer will help provide the next mentor. Don't forget to leave handover notes. It is the responsibility of the museum to find a new mentor, but if they need support with this you should try to help the museum find a new mentor through your own networks. If possible, have a handover meeting with the new mentor.

## **2.10 What happens if our relationship breaks down?**

As with all relationships, mentoring relationships can run into difficulties. If this happens, try to resolve the situation by meeting with the trustees and discussing the issues involved. Remember you have your initial agreement and the Accreditation review to refer to. You may find it appropriate to involve the local support officer/team or representatives from the assessing organisation depending on your and the museum's relationship with them. The mentor log will be a useful tool.

Both the museum and the mentor can end the relationship if they think it no longer works. The museum, however, must appoint another mentor to remain Accreditation compliant.

## Section three - techniques for advising and consulting

*Acknowledgement is given to Mr. Charles Lines of the National School of Government whose presentation during a Renaissance Yorkshire mentor event has influenced and guided the development of this section.*

### 3.1 Developing the relationship

It is the responsibility of both the museum and the mentor to develop a good relationship with each other. People who are mentors to more than one museum often report that their relationship operates in an entirely different way with each museum depending on working practices and personalities involved. Make sure you set the right tone from the start:

- you are an adviser and not a manager – remember as an adviser you have no right to vote on decisions at trustee meetings.
- think of yourself as a 'critical friend'. You need to be supportive but on occasion you may need to say difficult things.

You need to encourage the trustees to:

- use you by keeping in regular contact.
- put you on relevant mailing lists.
- have confidence in you.
- listen to your advice but ultimately make the decisions.
- give you access to trustees by inviting you to meetings and giving you due notice of the date of these meetings.

And not to:

- involve you in internal politics – you should remain neutral and advise on the Accreditation Standard.
- treat you as another volunteer, or as an honorary curator. Rolling your sleeves up and getting involved should only be an occasional activity.
- expect more time than is reasonable for you to give.
- rely too much on your advice, and inadvertently delegate management and policy decisions to you.

Being an effective mentor will rely on a whole range of skills and experience. You need to create a balance where the museum respects your role and advice, but doesn't become over-dependent on you.

## 3.2 Building the relationship

### Set clear parameters

The mentoring agreement, together with the Accreditation review, helps provide the framework within which to work, setting clear boundaries and expectations.

### Listen and understand what is going on

When you first get involved with the museum spend some time listening to the museum staff, volunteers and trustees. Gain an understanding of how the organisation operates and its culture. Different factors impact on this:

- history
- nature of business
- size
- management styles
- location

And different types of culture:

- power culture – control from centre
- role Culture – specialist roles controlled by a small band of senior managers
- task culture – main focus on projects
- person Culture – loose collection of expert professionals

In any organisation, people have official roles. People also develop their own personal roles linked to their own personality. These roles affect how teams operate. If you would like to know more, take a look at Belbin's *Team Role Theory* at <http://www.belbin.com/>

### Identify the key influencers

The key influencers may be the nominated leaders in the museum. However, there may be other people whose opinions are well respected within the organisation. Identify who the leaders and the key influencers are and get to know them. Don't just talk about the museum but get to know what people's wider interests are. Volunteers' motivations for getting involved with a museum may be very different from those of people who see museum work as a career.

Mentor relationships vary. You may mainly see the lead volunteer, or you may work mainly through the trustees. In fact you need to have established relationships with the key individuals. You will need to talk to the lead volunteer so you have an idea of what is happening on a daily basis, but you also need a relationship with the Chair of Trustees because you will need them to take your role seriously and on occasion they may be the only appropriate person you should work with.

## Identify the preferred way of receiving information

There are many ways of imparting/receiving information, for example:

Style	Directive	Facilitative
Lecture	Listen and follow instructions	
Teach	Listen and Acknowledge	
Train	Be guided towards making a decision	Be guided towards making a decision
Coach		Take advice then make a decision
Counsel		Find own solutions

You may have to take a different approach with each person you want to work with. Lecturing someone when they prefer to be counselled and vice versa will hinder how you communicate.

You will find that you may need to deliver your ideas in different ways according to the circumstances and people involved:

- telling
- selling
- participating
- delegating

## Using the right language

The museum profession is full of technical terms, acronyms and abbreviations. You may use these daily in your professional life but before you use them with the museum you advise, think about what approach will work for them. All museums are different and some staff and volunteers may thrive on this approach whilst others will just not understand what you are talking about.

Unfortunately people often don't like to reveal that they don't understand and if you continue with this unchecked, you will isolate yourself. It doesn't mean you can't use technical terms and professional language, but you may have to be prepared to help people understand. Ensure that your communication matches and is appropriate to the language that the museum and individuals working within the museum use.

## Building confidence

It's not unusual for volunteers in smaller organisations to sometimes lack confidence. They may say 'we are only volunteers', 'we aren't professionals', or get overwhelmed by the success of a neighbouring organisation. Other museums can be overconfident in their abilities, not realising that they aren't performing as well as they should be. Your first task is to get them to have confidence in you, then in themselves and then be able to accurately assess their own situation.

- Respect everyone involved and the skills they bring. Find out what their backgrounds are and how they came to be involved in the museum. Assume that all people have skills and abilities that can support the museum. As the museum professional your role is to provide the context and standards within which people work. If people haven't got a museum background it doesn't mean they can't contribute. There may be a range of excellent transferable skills from another context that you can harness.
- Take it one step further and use the SOAR Analysis technique, an example of which shown below, although there are many versions of SOAR.



Strengths	Appreciation of each other
Opportunities	Results already achieved

You may feel like charging straight in and getting things like the collection or learning offer sorted out, but starting by being critical or coming up with lots of ideas for improvements may make people feel bad about themselves and potentially less responsive to you as the relationship develops.

- Spend time celebrating achievements and what the museum is good at.
- Praise all concerned in some way.
- Point out how everyone has skills that can support the museum.
- Sow the idea of what can be improved by asking how other areas can be brought up to that standard or even higher.

This is a technique that you can repeat later on. It is useful way to help people refocus after bad news such as being turned down for a funding application.

In general you need to:

- praise the good things.
- not be over-critical of the less good.
- encourage improvement.
- reserve hard words for when you really need them.

This way trustees and museum staff and/or volunteers will take note of your advice when they need to. Once confidence is established all round you can begin to work with the museum.

### 3.3 Supporting more complex development and forward planning

With a change in mentor role the museum may wish to review its activity or develop its forward plan. Encourage self assessment through a variety of established tools:

#### SWOT Analysis

<b>Strengths</b>	<b>Weakness</b>
<b>Opportunities</b>	<b>Threats</b>

#### PESTLE Analysis

<b>Political</b>	<b>Economic</b>
<b>Sociological</b>	<b>Technological</b>
<b>Legal</b>	<b>Environmental</b>

These are standard techniques and you may well already use them in your own organisation. If not you should easily be able to find out more information. If your museum decides to undergo a review it may be an opportunity to involve the local support officer/team as joint facilitation may be more effective. You have an ongoing relationship with trustees, whilst the local support officer/team brings an external view.

#### Raising aspirations

Sometimes raising the aspirations of the museum workforce can be challenging. An effective technique is to encourage them to see how other people do it, ideally through a visit to another museum. Visits to other museums will be beneficial, but to specifically raise aspirations choosing the right museum is crucial. It needs to be of a similar size and background that demonstrates good practice. If you choose somewhere too large the museum workforce may feel overwhelmed and come up with many reasons as to why they can't perform to the same standard due to resources available. If it is too small then less will be learned and your museum may not think they need to change because they may think they are already performing. You need a museum or similar organisation facing similar challenges that the museum workforce can identify with.

Arrange for a visit for key people from your museum including a tour of the site and behind the scenes. Keep it informal and arrange for a cup of tea and chat at the end. If your museum isn't ready for this type of visit, reverse the process by asking someone from another museum to visit the museum to start the discussion. The assessing body, your local support officer/team or other mentors may know of suitable pairing museums.



Your museum should be encouraged to participate in appropriate local, regional or national museum networks which will bring them into contact with other museums facing similar issues.

### Succession planning

At some point you may need to discuss succession planning to help people see the bigger picture of the future survival of the museum. A suitable time to start the process could be when you support the forward planning process.

People volunteer for a whole range of reasons:

- to use and develop their skills
- they are interested
- they are an expert
- for social reasons
- they have free time available
- they want to contribute to the local community
- And many more.

Sometimes people get stuck in roles and stay too long on committees because of circumstance and it is difficult for them to change their roles to match their changing interests.

Why there are succession issues	Solutions
People can see themselves as the only person who can provide certain skills or expertise and block involvement by others	Review governance procedures. Provide training in succession planning. Encourage them to take on a development role for others.
There is an issue with governance and committee roles are not given a time limit, so the committee is not regularly refreshed	Review governance procedures
It's all too much but they don't want to give it up, because they haven't got anything else to do.	Develop a new, less demanding but equally fulfilling role elsewhere
There is no one else to take it on and they don't want to let everyone down – but they aren't happy	Develop a system of 'assistants' for each key role. This person can deputise when the person in the key role is away or off sick. This person can either take on the key role when the first person stands down or hold it temporarily whilst a replacement is found.
There aren't any more volunteers	<p>You should encourage your museum to continue to recruit more volunteers on an on-going basis and in different ways from what has happened before.</p> <p>If finding volunteers is proving a challenge, encourage the museum to review the roles and opportunities for volunteers. This could lead to new roles that may have more appeal to a wider range of people.</p>

Handle succession carefully as some people may find it difficult to discuss and cannot see the 'bigger picture' of the future of the museum. They may take offence at the idea of succession planning as a personal slight, when you are simply trying to introduce good management practice.

