



Accreditation: Documents Checklist

The checklist below outlines the documentation you will need to prepare as part of your Accreditation application. In some cases we'll ask you to submit a copy of the document. In others we'll simply need confirmation that you have the document available for inspection on request.

The scope and format of the required document may vary according to your museum size and type. You will need to provide **evidence of approval by the governing body** for requirements 1.2, 2.1, 4.2, 5.1, 6.1 and 7.1. For full details of how to meet each requirement, please read the **Accreditation: How to meet the Standard** guidance document in the [Accreditation Guidance Library](#).

You can combine policies and plans in a way that suits your organisation. For example your collections care and conservation policy may be part of a wider collections management policy. If multiple policies are combined you'll need to let us know where to find each individual policy. Please tell us the section / page number. You may wish to provide a cover document with an explanation for the assessor.

Accreditation Standard Requirement reference (*evidence of approval required)	Associated document to be attached on to Grantium.	Other documents that may be requested during the assessment process, or on a site visit.
1.1	Statement of purpose	
1.2*	Current, appropriate constitution / governing document.	
1.3	<p>Document describing current governance and management</p> <p>All:</p> <ul style="list-style-type: none"> - Confirmation of authority to approve policies and plans - How you access professional museum advice - Committee structure - Terms of reference - Signed minute of approval - Organisation or workforce structure - Volunteer agreement or equivalent - Arrangements for training, induction and succession planning <p>Independent museums - if applicable:</p> <ul style="list-style-type: none"> - Signed Accreditation Mentor agreement 	(If applicable) Accreditation Mentor report

	<ul style="list-style-type: none"> - Signed minute confirming the appointment of the Accreditation Mentor - Approved agreements between governing and managing bodies (if managing body is outsourced) 	
2.1*	<p>An approved and appropriate forward or business plan which covers the current and subsequent planning year and signed approval (for statement of purpose and key aims)</p> <p>Budgets for current and next planning year</p>	
2.2	Signed and approved accounts for the last two available financial planning years	
3.1		Security of Tenure (possible to request on site visit)
3.2		Security Risk Assessment (possible to request on site visit)
3.3		Emergency Plan (possible to request on site visit)
4.1	<p>Confirmation of the size of collection, the proportion the museum owns, the proportion on loan to it and whether any associated loan agreements are up to date</p> <p>(Loan agreement(s) only if these account for more than 50% of total collection held)</p>	

4.2*	Collections Development Policy and signed approval using the 2014 template (template is available in the Accreditation Guidance Library). (For some organisations this could be more than one document)	
5.1*	Documentation policy or statement and signed approval	
5.2	Documentation Procedural Manual	Documentation Plan (possible to request on site visit)
6.1*	Collections care and conservation policy or statement and signed approval	
6.2		Collections care and conservation plan (possible to request on site visit)
7.1*	Collections access policy or statement and signed approval	
7.2		Access plan
8.1		Plan for users and non-users
8.2		Assessment of users' needs
8.3		Plan for developing range of users
9.1		Plan and activities (including exhibitions and programmes) for learning and engagement
9.2		Communications with users (visitor information, print and online resources, marketing or communications plan)

Additional mandatory documents for National/Nationally Styled

Requirement reference	Requirement type	Document (attach on Grantium)
9.1	National/Nationally Styled	A breakdown showing how many people have used your research facilities in the last 12 months
9.1	National/Nationally Styled	Copy of museum display policy
9.1	National/Nationally Styled	A copy of your published catalogue as an attachment or web link
9.1	National/Nationally Styled	A list of scholarly works your museum has published in the last three years