Museum Accreditation site visits

Name of assessing organisation	
Name of assessor	
Name of museum	
Accredited number	
Date of visit	

Some documents and information are required for Accreditation, but museums are not asked to provide them with the online form. We'll ask to see them during the visit.

The checklist covers the Accreditation requirements, and within each requirement are examples of how you might provide this information. You don't have to provide supporting information against each example. We'll look at what's appropriate for your size and type of museum and the Accreditation guidance will help you decide what evidence to provide.

Note: **AOR = Documents to be made available on request.**

Organisational health

Accreditation requirement	Yes	No	Comments
AOR 1.3 Satisfactory governance and management arrangements			
Confirm any queries from workforce chart			
Provide examples of employment policies and procedures to confirm these are in place *(e.g. Health & safety policy, safeguarding policy, equal opportunities and diversity, complaints policy and procedures)*			
Provide details of induction process *(e.g. an induction agenda or pack)*			
Provide details of workforce procedures, *(e.g. a 'Volunteer Handbook' or equivalent)*			

Accreditation requirement	Yes	No	Comments
AOR 3.2 Risk assessment of security arrangements			
Confirm expert advice e.g. written reports /notes of meetings from specialists indicated in application			
Confirm date of last security review (must be within five years)			
Internal specialist or specialist from another museum			Date:
Local police liaison/community safety officer			Date:
Alarm or insurance provider			Date:
National Security Adviser			Date:
Other			Details: Date:
If expert advice not obtained evidence of risk assessment using The Security Audit framework on the Collections Trust website.			Date:
Confirm security advice covers arrangements for:			
Workforce and visitors			
Buildings/site			
Collections on display			
Collections in store, in offices or off site			
Collections information			

Accreditation requirement	Yes	No	Comments
AOR 3.3 A Clear, workable emergency plan			
Review procedure and date of review (minimum five years)			
Confirm arrangements for the workforce, visitors, collections and collections information			
Confirm plan covers risk assessments of threats (fire, water, theft, vandalism etc.)			
Confirm how plan is authorised, maintained, communicated, tested and made available to workforce			
Work with emergency services			

Accreditation requirement	Yes	No	Comments
Links to other emergency plans e.g. shared building (if applicable)			
Salvage priorities	3		
First aid steps for damaged objects (e.g. access to emergency kit)			

Managing collections

Accreditation requirement	Yes	No	Comments
AOR 5.2 Spectrum primary procedures			
Confirm procedural manual exists			Spectrum
Written by:			
Review date:			
Confirm implementation of Spectrum 5.0 nine primary procedures			
Object entry			
Acquisition and accessioning			
Location and movement control			
Inventory			
Cataloguing			
Object exit			
Loans in (borrowing objects)			
Loans out (lending objects)			
Documentation planning			
Documentation planning			
No inventory backlogs			Go to 6.2
Inventory backlog exists			Completion date:
Plans to develop collection documentation with clear priorities and timescales			

Documentation in practice demonstration – object to record

Accession number	Description	Located (Y/N)	Comments

Documentation in practice demonstration – record to object

Accession number	Description	Located (Y/N)	Comments

Accreditation requirement	Yes	No	Comments
AOR 6.2 Collections care and conservation plan			
Collections overview			
Overview of current collections/awareness of collection needs			
Identify vulnerable items & priorities for action with timescales			
Identify main threats for collections on display & in stores			
Environmental monitoring & control			
Suitable building conditions for collections, incl. maintenance info			
Appropriate environmental conditions			
Environmental monitoring programmes (temperature, light and relative humidity)			
Arrangements for pest management			
Regular cleaning/inspection			
Appropriate packing and storage techniques, material, equipment			
Resources & advice			
Resources to deliver the plan			
Access professional conservation advice			

	Yes	No	Comments
All museums except independent size 1&2:			
Planned programme of remedial & preventative work			
Arrangements for employing contract/freelance conservators			
Review periods/timetabled actions			

Users and their Experiences

Accreditation requirement	Yes	No	Comments
7.2 An access plan			
Confirm how the museum identify access issues			
Confirm date of last access assessment (at least every five years)			
In-house review (e.g. access checklist, facilities checklist, review of interpretation and collections use)			
External review (e.g. Focus groups, support agencies, advocacy groups, charities, experts)			
Other			
Orientation and signage			
Information available externally (e.g. nameplates, directional signs, information boards, site plans, other)			
Information available internally (e.g. guidebook/leaflet, directional signs, floor plans, information point, other)			
Confirm accessible public facilities			
Toilets			
Refreshments			
Car Parking			
Other			

Accreditation requirement	Yes	No	Comments
8.1 Understanding users and non-users			
Confirm how the museum consults with its users and non-users and what it does with this information			
Examples can include: ▪ *Visitor books & analysis process (benchmarking)* ▪ *Comment cards & analysis process* ▪ *Exit surveys (or analysed reports)* ▪ *Market research (or analysed reports)* ▪ *Friends Group – 'Minutes' etc and analysis process* ▪ *Focus Groups – consultation plan; transcript; analysis report* ▪ *Postcode analysis* ▪ *Workforce consultation and analysis* ▪ *Other*			

Accreditation requirement	Yes	No	Comments
9.1 Stimulating learning and discovery activities			
Confirm effective learning and engagement activities			
Examples can include: ▪ *Specialist lectures or talks* ▪ *Groups, self-led or guided tours* ▪ *Self-led learning opportunities* ▪ *Partnerships to support learning (for e.g. special interest groups, local community groups, further education providers or adult learning)* ▪ *Publications* ▪ *Learning resources* ▪ *Visitor information available for groups* ▪ *Other*			

Confirm publications, research and facilities available to users			
Promotional events			
Printed material			
Website			
Database research			
Research facilities for users			
Research results (publications, articles; exhibition fliers)			
Other			
Confirm collections are on display			
Permanent exhibitions of material from collection			
Temporary exhibitions of material from collection			
Access arrangements to store			
Confirm how the collections are interpreted			
Examples can include: - *Appropriate labels and panels* - *Printed guides and catalogues* - *Oral recordings, films, sound archives* - *Guided tours* - *Live interpretation* - *Interactives* - *Audio guides* - *Trails* - *Quizzes* - *Dressing up* - *Handling collections* - *Apps* - *Other*			

Accreditation requirement	Yes	No	Comments
9.2 Communicate effectively with users and potential users through a range of access, marketing and promotional activities			
Confirm that published information contains the following details			
Access information			
Location and how to get there			
Services and visitor facilities			
Opening times			
Out-of-hours opening & appointment-only arrangements, if limited opening times			
Access to collections not on display			
Current exhibitions and programmes			
Multiple languages (if applicable)			