

**Museum Accreditation self-assessment planning 2024**

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| **Museum** |  |
| **Time period** |  |
| **When was the last museum return?** |  |
| **Areas for development identified at last award** |  |

**You might find it useful to refer to Arts Council England’s ‘Accreditation standards documents checklist’ from the ‘**[**Meeting the Standard’**](https://www.artscouncil.org.uk/supporting-arts-museums-and-libraries/uk-museum-accreditation-scheme/accreditation-guidance-library#t-in-page-nav-2) **section of the** [**Guidance Library**](https://www.artscouncil.org.uk/supporting-arts-museums-and-libraries/uk-museum-accreditation-scheme/accreditation-guidance-library)**, and the** [**application for question sets**](https://www.artscouncil.org.uk/supporting-arts-museums-and-libraries/uk-museum-accreditation-scheme/accreditation-guidance-library#t-in-page-nav-4) **as you go through the self-assessment.**

| **Requirement** | | **Requirement** | | **Date for policy/plan review if applicable** | **Yes/no** | **Actions required** | **Target date for completion** |
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|  |  | | **Organisational Health** | | | | |
|  |  | | **Have appropriate governance and management** | | | | |
| **1.1 A clear statement of purpose** | | Statement of purpose exists /is still appropriate? When was it last reviewed? | |  |  |  |  |
| **1.2 An appropriate constitution** | | Does it benefit the public?  Does it protect our collections and other assets?  Is the structure and our documentation appropriate? | |  |  |  |  |
| **1.3 A satisfactory structure for your governance and management** | | Is there an organisational chart which includes governing body, staff and volunteers?  Who approves decisions?  Are their clear agreements with staff and volunteers?  What evidence do we have that the governing body has access to professional advice? | |  |  |  |  |
|  |  | | 1. **Plan ahead and have the resources to deliver your plan** | | | | |
| **2.1 A forward or business plan which covers the current and subsequent planning year** | | Does the plan cover the current and subsequent year?  Is it approved by the governing body?  Does it include the statement of purpose?  Key aims and an explanation of how these will be met?  Details the people and resources needed to meet the aims?  Includes associated budgets?  Includes next review date? | |  |  |  |  |
| **2.2 Financial sustainability** | | Do we have accounts for the last two years? | |  |  |  |  |
|  |  | | 1. **Assess and manage risk to your organisation** | | | | |
| **3.1 Secure occupancy of all premises containing collections** | | Are formal occupancy arrangements of at least 12 months duration in place for all buildings and sites housing collections? | |  |  |  |  |
| **3.2 A risk assessment of security arrangements** | | Has a security assessment been conducted in the previous five years?  Can we demonstrate the changes we have made as a result of the advice? | |  |  |  |  |
| **3.3 A clear, workable emergency plan** | | Do we have an emergency plan?  Does it cover staff, volunteers, visitors and collections?  Do we share the plan with staff, volunteers and the emergency services?  Have we tested the plan?  Do we have a priority salvage list?  When will we review the plan? | |  |  |  |  |
|  |  | | **Managing collections** | | | | |
|  |  | | 1. **Hold and develop collections** | | | | |
| **4.1 To take responsibility for all the collections you manage** | | How many objects to we have in the collection?  What proportion of the collection do we own and how much is on loan?  What are our loan arrangements? | |  |  |  |  |
| **4.2 A policy, approved by the governing body, for developing collections, including acquisitions and disposals** | | When was our collections development policy last reviewed?  Is it approved by the governing body?  Does it include:  The statement of purpose  An overview of current collections  Themes and priorities for future collecting  Themes and priorities for rationalisation and disposal  Information about the legal and ethical framework for acquiring and disposing of items? | |  |  |  |  |
|  |  | | 1. **Hold useful and useable information on collections** | | | | |
| **5.1 An approved documentation policy** | | Do we have a documentation policy?  Is it approved by the governing body? | |  |  |  |  |
| **5.2 To follow the primary Spectrum documentation procedures** | | Do we have procedures in place for the primary Spectrum procedures?  *• Object entry*  *• Acquisition and accessioning*  *• Location and movement control*  *• Inventory*  *• Cataloguing*  *• Object exits*  *• Loans in (borrowing objects)*  *• Loans out (lending objects)*  *• Documentation planning*  Do we have a documentation procedures manual?  Do we have a documentation plan providing information on how we are managing our backlog? Does it have priorities and timescales? | |  |  |  |  |
|  |  | | 1. **Care and conserve collections** | | | | |
| **6.1 An approved collections care and conservation policy** | | Do we have a collections care policy?  Is it approved by the governing body? | |  |  |  |  |
| **6.2 A collections care and conservation plan** | | Do we have a collections care and conservation plan? | |  |  |  |  |
|  |  | | **Users and their experiences** | | | | |
|  |  | | 1. **Be accessible to the public** | | | | |
| **7.1 An approved access policy** | | Have we conducted an access assessment of the museum (accessibility it its widest form, not just physical access) using an external assessor?  Do we have an access policy?  Is it approved by the governing body?  When is the policy next reviewed? | |  |  |  |  |
| **7.2 An access plan** | | Do we have an access plan? | |  |  |  |  |
|  |  | | 1. **Understand and develop your audiences** | | | | |
| **8.1 To understand who uses your museum and who doesn’t** | | Do we know who uses the museum?  Do we know who doesn’t use the museum?  Do we have methods in place to gather information about our users and our non-users? | |  |  |  |  |
| **8.2 To use information to assess your users’ needs** | | Do we use feedback from our users to inform how we develop?  Does the forward plan reflect feedback we’re gathered? | |  |  |  |  |
| **8.3 To have a plan for developing your range of users** | | Have we created a plan for developing our audiences?  Is this reflected in the forward plan?  Which development audiences are we planning to work with?  Do we have an audience development plan or are audiences included in our forward plan? | |  |  |  |  |
|  |  | | 1. **Engage with your users, and improve their experiences** | | | | |
| **9.1 To provide stimulating learning and discovery activities, including exhibitions and programmes based on your collections** | | Do we have a variety of ways for people to learn?  What do we provide differently for different groups who use us?  How do we help different people access the museum and the collections? | |  |  |  |  |
| **9.2 To communicate effectively with users and potential users through a range of access, marketing and promotional activities.** | | How do we promote what we do?  How do people find out about how to visit us and what we have to offer?  What do we do to promote access to the collections? | |  |  |  |  |