Guidance for writing Policies to meet the UK Museum Accreditation Standard 2011

Introduction
This guidance has been developed to help museums of all sizes and types to meet the minimum Accreditation standard for three new policies required as part of the Accreditation 2011 standard. This guidance should be read in conjunction with the ACE Accreditation guidance and is not intended to replace them.

- Requirement 2.3 Documentation Policy
- Requirement 2.4 Care and Conservation Policy
- Requirement 3.1.5 Access Policy Statement

All Museums will have different needs and, unlike the template for the Development Policy provided by ACE, this template cannot provide specific wordings that will suit all museums. Instead, it includes suggested section headings and an explanation of what to include in each section. As all museum policies need to reflect the priorities of their particular situation, no two will be the same, and you should not be tempted to copy the policy of another museum.

- **Requirement 2.2 Development Policy is not included in this guidance** – ACE provides a template policy that all museums must follow. It can be found here [http://www.artscouncil.org.uk/what-we-do/supporting-museums/accreditation-scheme/guidance-documents/](http://www.artscouncil.org.uk/what-we-do/supporting-museums/accreditation-scheme/guidance-documents/)

Before you start
Some principles of a good policy:

- The function of a policy is to set out the guiding principles that you are working to.
- A policy will specify the ‘what’ and the ‘why’. It will not go into the detail of ‘how’, ‘who’, ‘where’ etc. which are elements of a plan.
- A policy can be seen as a statement of intent, or commitment by the governing body.
- It should be reviewed every five years or so and be signed off by the governing body.
- You do not need to give detailed descriptions of your museum’s current practice in each policy area. An overview of your current systems and any weaknesses you have identified should be included in the appropriate plan (Forward Plan, Documentation Plan or Care and Conservation Plan). Further detail of how your documentation system works will be detailed in your documentation procedural manual. There is no need to repeat this in the policy.
- The language of policy suggests future action and aspiration and includes phrases like – ‘The museum will….’, ‘We aim to…..’, ‘The museum is committed to…..’, ‘We will continue to…, ‘We will be guided by….’

What else will the assessor will look for?

- Are the policies realistic? Check that you are meeting the minimum list, but make sure you are not making policy commitments that are obviously beyond your current staff or budget capacity. The assessor may cross-check your policy statements against your financial and staffing information and against your forward plan.
Do the policies complement and cross-refer to each other where appropriate? You can choose to present your policies as individual documents, or combine them, along with the Development policy, into one Collections Management Policy. Either way, there may be some areas of policy which impact on the other policies and this should be stated clearly. E.g your development policy states that decisions about new acquisitions will take account of the likely conservation and storage costs of acquiring the object.

The Documentation Policy (Requirement 2.4)

Accreditation guidance stipulates a few minimum requirements for the documentation policy (or documentation policy statement) and these are included in the template below. You can, of course, develop your policy statement beyond this minimum level to include other areas that are of priority to your museum, but so long as you include the following elements as well, you will meet the requirement for Accreditation.

Title
Museum Name (or Governing Body Name) Documentation Policy

Approval date
Insert the date the policy is approved by the governing body

Review date
Insert the month and year that the policy will be reviewed

Introduction
You should state that this policy will guide the work your museum does in the field of collections documentation. You may also give a brief description, or definition of museum documentation.

You may also wish to repeat the statement in paragraph a) page 11 of the Accreditation Guidance – for section 2 – collections.

The aim of the documentation policy is to ensure that the museum fulfils its responsibilities in relation to security, management and access of collections

- Improve accountability for collections
- Maintain at least minimum professional standards in documentation
- Extend access to collection information
- Strengthen the security of the collections

Ethics and legislation
Your policy should state any relevant ethical guidelines or legislation that guide this area of museum work or which you are obliged to work to.

e.g. (but not exhaustive)

- Data Protection
- Freedom of Information (if relevant)
- Museum Association Code of Ethics

Accountability
Your policy should make a commitment to maintaining at least the minimum level of collections documentation that will allow you to identify and locate all items for which you are legally responsible, including loans.
Standards
Include a statement about your museum’s commitment to following SPECTRUM, The UK Collections Management Standard. Specifically, your museum must meet the minimum standards for the SPECTRUM primary procedures:
- Object Entry
- Acquisition
- Loan in
- Loan out
- Location and movement control
- Cataloguing
- Object exit

Optional
- Some museums may wish to specify internal standards, or targets, for the documentation of parts of the collection. e.g.
  - We will accession all new collections material within 2 months of the decision to acquire
  - We will create inventory level descriptions on our database for all new accessions within 6 months of the accession date.
- There may be other technical standards that you adhere to that you wish to state in your policy

NB - Including this level of detailed commitment in your policy is not a requirement of Accreditation.

Access to collections information
Give a statement about your commitment to ensuring that your documentation allows for access to information for, as an example
- Staff
- Researchers
- Other users....
Or, that you are committed to working towards improving access to the collections information if it is something that is currently not possible due to a backlog, or incomplete systems.

Security of Collections information
Make a statement about your commitment to ensuring the physical security of the records in your documentation systems and the long-term preservation of those records, including a regular back up of electronic data and security copying of key records such as Accession registers.

You can detail how you do this, or intend to do it. But remember, if you intend to publish your policy now or in the future, do not include enough detail to endanger the security of your records.

Keeping records up to date
You should be ensuring that paper and electronic records, and security copies of them, are regularly checked to make sure that they are not becoming obsolete. Include a statement committing your organisation to ensuring that you keep your documentation up-to-date and readable.

OPTIONAL:
When management of collections is delegated to another body
If your governing body has delegated management of the collections to another body you need to ensure that your policy reflects the relationship between the two bodies and specifies clearly which organisation is responsible for what. This may mean that your policy requires consultation and final approval from more than one body.
The Collections Care and Conservation Policy (Requirement 2.5)

Accreditation guidance stipulates minimum requirements for the care and conservation policy (or policy statement). These are included in the template below. You can, of course, develop your policy statement beyond this minimum level to include other areas that are of priority to your museum. So long as you include the following elements as well, you should meet the requirements for Accreditation.

Template

Title
Care and Conservation Policy
Museum Name (or Governing Body Name)

Approval date
Insert the date the policy is approved by the governing body

Review date
Insert the month and year that the policy will be reviewed

Introduction
You should state that this policy will guide the work your museum does in the field of collections care and conservation and it should state that your Collections Care and Conservation Plan (Accreditation requirement 2.6) will help to deliver the statements made in this policy.

You may also give a brief description, or definition, of museum collections care and conservation.

You could repeat this statement adapted from paragraph a) on page 13 of the Accreditation Guidance – for section 2 – collections.

Caring for the collections is a fundamental duty for all museums. [This policy includes] a combination of preventive and remedial conservation measures, designed to ensure long-term preservation.

- Preventive 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 in order to stabilise it or enhance some aspects of its cultural or scientific value.

Ethics and legislation
Your policy should state any relevant ethical guidelines or legislation that guide this area of museum work or which you are obliged to work to.

e.g. (but not exhaustive)
- Museum Association Code of Ethics
- Health and Safety at Work etc. Act 1974
- COSHH Regulations 2002
Standards
Make reference to standards and guidelines that you work within, or use to guide your work in collections care:
- Benchmarks in Collection Care is relevant to most museums and it is recommended that you include a commitment to using Benchmarks in your policy.

Optional
If you work to BS5454/PD5454 ‘Recommendations for storage and exhibition of archival documents’, or ‘PAS198:2012 Specification for managing environmental conditions for cultural Collections’, or any other relevant standards, then include reference to these in your policy.

Collections Care and Preventive Conservation
Either give a short general commitment to managing the collections in accordance with the sector guidance set out in Benchmarks in Collection Care.

Or, you can give more detail of your commitments under each of the following headings:
- Collections Condition overview
- Environmental monitoring
- Environmental control
- Provision of suitable buildings
- Housekeeping

Remember – don’t list what you currently do, but make statements about your intentions. If you are already meeting good practice guidance then you can state that you intend to continue to meet the level.
If, however, you need to make improvements, don’t list the defects, but make statements such as: ‘the museum is working towards meeting Benchmarks Basic level for Environmental Monitoring practice by investing in light monitoring equipment and expanding our light monitoring programme to include all display areas’

OPTIONAL: Care of Working Objects
If you have objects that are used, or operated, or that require special types of collection care, you may need to write a separate policy outlining your approach to the care of these working collections.

Reference to other policies and plans
Your policy should make reference to any plans that may impact on your collections care and conservation policy.
- Emergency Plan
- Forward plan
- Collections Care and Conservation Plan, or planning information on Collections care and conservation included within a wider plan (Accreditation requirement 2.6).

You may also need to refer to other policies that your collections care policy may have an impact on.
Professional Conservation Advice

You should state your commitment to consult a professional conservator for advice when needed.

You should state your commitment use a professional conservator for remedial conservation, or for remedial conservation to be carried out under the supervision of a professional conservator Accredited by ICON and listed on the Conservation Register.

http://www.conservationregister.com

OPTIONAL:
When management of collections delegated to another body

OPTIONAL
If your governing body has delegated management of the collections to another body you need to ensure that your policy reflects the relationship between the two bodies and specifies clearly which organisation is responsible for what. This may mean that your policy requires consultation and final approval from more than one body.
The Access Policy Statement (requirement 3.1.5)

Accreditation guidance gives very little information about what is expected from an Access policy statement. Many museums will already have an access policy in place, or an Access and Learning Policy. If you have a policy already, you should check that the following issues adequately covered. If you are writing an access policy for the first time, your policy should include the following as a minimum, but you may wish to develop your policy further to reflect your museum’s wider activities.

Template

Title

Access Policy
Museum Name (or Governing Body Name)

Approval date

Insert the date the policy is approved by the governing body

Review date

Insert the month and year that the policy will be reviewed

Introduction

You should state that this policy will guide your museum’s approach to providing access to the collections and associated information.

You should make a clear commitment to enabling access to your collections for education, research and enjoyment by all within the reasonable constraints of resources, conservation and security.

Ethics and legislation

Your policy should state any relevant ethical guidelines or legislation that guide this area of museum work or which you are obliged to work to. e.g.

- Equality Act 2010

Access Assessments

Commit to assessing, identifying and addressing access issues by means of internal checklists, access audits, or working with local advocacy groups

User Needs

You must state your understanding that users have different needs and that you are committed to reducing barriers to both physical and intellectual access to your collections.

NB – the detail of what you say here, should be guided by the outcomes of your regular Access Assessments.

Reference to other policies

Your policy should state if there are any obvious restrictions to access to parts of your collection, e.g. due to the sensitivity of the material.

Access will need to be balanced with the need to care for the collections and also, by the current state of your collections information. In this policy statement you can simply refer to the Collections Care and Conservation Policy, and Documentation Policy rather than repeating the information here.

Other languages

State your position with regard to providing materials other languages if relevant (Welsh, Braille, British Sign Language)