



# Museum Standards Programme for Ireland

## Standards and Guidelines





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## INTRODUCTION ■ ■ ■

The purpose of the **Museum Standards Programme for Ireland (MSPI)** is to benchmark and promote professional standards in collections care and to recognise the achievement of those standards within the Irish museum sector.

The term 'museum' includes museums, galleries, and collecting agencies and, for MSPI purposes, is defined as follows:

*Museums are not for profit institutions that collect, safeguard, hold in trust, research, develop and interpret collections of original objects and original objects on loan, for the public benefit. They function publicly as places where people learn from and find inspiration and enjoyment through the display and research of original objects.*

Accreditation is open to all Irish museums that meet the eligibility criteria. The standards are achievable and can be applied to museums of all sizes and levels of funding. MSPI participants to date have ranged from national institutions, through local authority, to private, co-operative and small volunteer-run museums.

### Commitment

Participation in the programme involves the joint commitment of museum governance and staff in a process that may take up to five years to complete. Museums working towards accreditation will need to appoint a project-manager and allot specific work time to the programme. During the programme all aspects of the museum's organisation will be reviewed, necessitating the focus and time of other museum staff.

Museum staff may also be required to attend training workshops. Since not all participating museums employ museum-trained or conservation staff, the programme offers a series of workshops covering all areas of the programme including caring for collections, museum governance and visitor services. The workshops are free of charge to participants.

### Eligibility

To participate in the MSPI, museums must first apply for eligibility, demonstrating that they meet the definition of a museum and submitting supporting information and documentation.

The museum's application for eligibility will be reviewed by the MSPI **Advisory Group**. The Advisory Group is made up of senior members of the Irish and international museum sector; the Department of Arts, Heritage and the Gaeltacht; the Arts Council; and the Irish Museums Association. The Advisory Group's role is to determine eligibility, make recommendations regarding achievement of the Standards, and advise the Heritage Council on the development of the programme.

The Heritage Council is the awarding agency. It makes the final decision about eligibility, awarding accreditation to applicants and the development of the programme.

A **consultant coordinator** has been appointed by the Heritage Council to manage the programme.

The coordinator's role is to:

- Manage and coordinate MSPI on behalf of the Heritage Council
- Facilitate each museum's achievement of the standards
- Liaise with each museum regarding the orientation and other required training workshops
- Visit each museum on-site at least twice to advise on aspects of the programme

- Be available by phone or email to advise on the programme
- Coordinate receipt of accreditation applications and the assessor site-visits
- Assist with the organisation of extra training workshops and on-site consultations as required
- Advise on the future development of the programme

## THE ACCREDITATION TIMELINE AND PROCESS

### Orientation

When a museum is informed of its eligibility, up to two members of the museum's staff will be invited to attend an orientation. During the orientation, museums will be introduced to the people involved in the programme and be given an overview of the accreditation process. They will also be introduced to their **mentor museum**.

Mentor museums already have experience of the MSPI and have agreed to support newly eligible museums by sharing their experience of the programme. Museums will be 'matched' with a suitable mentor museum.

The orientation will also outline the specific **Standards** of the MSPI, which is based on thirty-four minimum standards divided into seven categories:

1. Constitution and policies
2. Museum management
3. Caring for the collection
4. Documenting the collection
5. Exhibition (long term and temporary)
6. Education
7. Visitor care and access

Twenty-five of the Standards relate to Interim Accreditation and nine relate to Full Accreditation. The Standards were developed and tested by the Heritage Council and senior museum professionals.

The thirty-four minimum Standards are accompanied by **Guidelines** that indicate what is required to meet the Standards. Decisions regarding whether to award, postpone, or deny accreditation may only be made with reference to the Guidelines.

It can take up to five years from receipt of the application for eligibility to achieve all the Standards. The process is divided into three stages which take the museum to Interim Accreditation and ultimately to Full Accreditation.

### Stage 1: Self-assessment review

Museums spend five to six months reviewing their operation against the Standards and further questions on the Accreditation Application Form. This review should involve both museum personnel and their governing bodies. Early in this stage a member of the museum's staff should be chosen to project-manage the accreditation process. During this stage museums will also receive a personal visit from the programme's coordinator.

At the end of this review period, museums will have concluded a comprehensive self-assessment of their entire operation. At this time the museums will complete and submit the Accreditation Application Form and supporting documentation, usually by the end of June. The museum will then receive its 1st Assessment site-visit from two MSPI assessors. This visit usually occurs during September. The purpose of the self-assessment and this visit is to confirm which standards the museum may already have attained and which

standards remain to be attained. Before leaving the museum, the assessor will also take time to discuss any issues noted during their visit which may affect the museum's application for Interim and Full Accreditation. The visit will be followed up by the Assessors' Report confirming their findings both for the museum and the Heritage Council.

## **Stage 2: Application for Interim Accreditation**

Following the 1st Assessment, museums have up to twenty months to prepare and apply for Interim Accreditation. Early in this stage a selected member of the museum's staff will attend a workshop on preparing a strategic management plan. A rotating series of workshops will also be organised to complement other training requirements to achieve the standards.

At the end of this stage museums will complete the Interim Accreditation Application and submit supporting documents. Two assessors will complete the 2nd Assessment site-visit. Based upon the Assessors' Report, the museum has up to two months to review and rectify any areas which fail to meet the standards required for Interim Accreditation. The assessors' Final Report is then forwarded to the Advisory Group for review. Based upon this review the Advisory Group will make recommendations to the Heritage Council regarding the awarding, postponing or denying of Interim Accreditation status under the MSPI.

## **Stage 3: Application for Full Accreditation**

It is expected that museums will normally apply for Full Accreditation within twelve to twenty-four months of applying for Interim Accreditation. Prior to applying for Full Accreditation, a member of the museum's staff will have attended all of the caring for collections workshops organised to complement the training requirements of the standards, although agreed equivalent training may also suffice.

The 3rd Assessment site-visit will take place following completion of the Full Accreditation Application and submission of supporting documents. Assessors will also be required to spot-check that the standards for Interim Accreditation have been maintained. Based upon the Assessors' Report the museum has up to two months to review and rectify any areas which fail to meet the required standards. The Assessors' Final Report is then forwarded to the Advisory Group for review. Based upon this review the Advisory Group will make recommendations to the Heritage Council regarding the awarding, postponing or denying of Full accreditation status under the MSPI.

Some museums may already have a significant number of the standards in place when they apply for eligibility, allowing them to move more quickly through the programme. Museums that meet the training requirements and feel they are ready can apply for both Interim and Full Accreditation at the end of Stage 2. If the museum achieves all the Interim Standards but fails in any of the Full Standards only Interim Accreditation status will be awarded. The museum will then move forward to complete Full Accreditation status by the end of Stage 3.

## **Maintenance of Accreditation**

Between 2010 and 2012 the MSPI piloted an application process for Maintenance of Full Accreditation. Accredited organisations are required to submit an application to confirm maintenance of the standards within three years of receiving their accreditation certificate. An assessor will review the application, conduct a site-visit and submit a report to the Heritage Council. The assessor's recommendations will be reviewed by the Advisory Group. Its recommendations will be considered by the Heritage Council which will confirm to the applicant if a certificate confirming the standards have been maintained will be issued.

## **Timeframe**

The journey from Eligibility Application to Full Accreditation can be a long one, typically taking around five years to complete. The table below outlines what to expect in terms of timeline and process.



## TYPICAL TIMELINE AND PROCESS

Typical timeline and process	Time	Cumulative time
<b>Eligibility application</b> <ul style="list-style-type: none"> <li>Museum submits application in September</li> <li>Application reviewed and eligibility status reviewed by the Advisory Group</li> <li>The Heritage Council confirms eligibility in December</li> </ul>	3 months (from submission)	3 months
<b>Orientation</b>	2 months	5 months
<b>Coordinator site-visits and submission of accreditation plan</b> <ul style="list-style-type: none"> <li>Management, Care of Collections and Visitor Services review by museum against Standards &amp; Guidelines</li> <li>Submit Accreditation Application and supporting documents at the end of June</li> </ul>	1 month 3 months	6 months 9 months
<b>1st Assessment site-visit</b>	3 months	12 months
Based on 1st Assessors' Report: <ul style="list-style-type: none"> <li>Work towards achieving Interim Standards</li> <li>Strategic Management Plan, Care of Collections workshops</li> <li>Targeted training as required</li> <li>Coordinator site-visits – at least one</li> <li>Submit Application for Interim Standards</li> </ul>	24 months	36 months
<b>2nd Assessment site-visit</b>	1-2 months	37-38 months
Probationary review period <ul style="list-style-type: none"> <li>Museums have opportunity to review and achieve Standards indicated as not yet achieved by assessors</li> <li>Submit documentation for further review by assessors</li> </ul>	2 months	40 months
Achievement of Interim Standards <ul style="list-style-type: none"> <li>Assessors' Reports and final recommendations are reviewed by the Advisory Group</li> <li>Interim Standards recommendations made to the Heritage Council</li> <li>The Heritage Council confirms achievement of Interim Standards based upon recommendations</li> </ul>	2 months	42 months
<b>Accreditation Awards Ceremony – Interim Accreditation</b>	2 months	44 months
Based on achievement of Interim Accreditation <ul style="list-style-type: none"> <li>Work towards achieving Full Accreditation</li> <li>Complete all Care of Collection workshops</li> <li>Targeted training as required</li> <li>Coordinator site-visits – at least one</li> <li>Submit Application for Full Accreditation</li> </ul>	up to 14 months	up to 60 months
<b>3rd Assessment site-visit</b>	1-2 months	61-62 months
Probationary review period <ul style="list-style-type: none"> <li>Museums have opportunity to review and achieve Standards indicated as not yet achieved by assessors</li> <li>Submit documentation for further review by assessors</li> </ul>	2 months	64 months
Achievement of Full Accreditation <ul style="list-style-type: none"> <li>Assessors' Reports and final recommendations are reviewed by Advisory Group</li> <li>Full Accreditation recommendations made to the Heritage Council</li> <li>The Heritage Council confirms achievement of all thirty-four Standards based upon recommendations</li> </ul>	2 months	66 months
<b>Accreditation Awards Ceremony</b>	2 months	68 months

## HOW TO APPLY ■ ■ ■

The purpose of this guide is to support MSPI applicants through the Accreditation Application process. Please read this document carefully before completing the Application Form, which is available from the MSPI coordinator.

Before applying for Accreditation, applicants must demonstrate that they are eligible for the programme by submitting an Eligibility Form (see page 7). Successful applicants will be notified of acceptance to the programme.

Once applicants have been deemed eligible and invited to join the programme, the Accreditation Application process begins. Please be aware that museums will be asked to resubmit, or possibly revise, their Eligibility Form as part of the Application process.

The Accreditation Application Form is a self-assessment questionnaire. Applicants must type their responses into the Application Form with the assistance of this guide.

Both this guide and the application form are structured as numbered questions. The questions that relate directly to the Minimum Standards are highlighted. Each of these is accompanied by a list of requirements, which are obligatory to meet the Minimum Standards. Questions that do not relate to Minimum Standards are also included because the application form serves as a self-assessment of the museum's overall operations. All questions must be answered.

Certain standards require the submission of supporting documents. This requirement is indicated on the form. For some standards, a supplementary statement of formal approval from the museum's governing body is also required. Please ensure that all required documentation is included with your application.

The Application Form includes questions that relate to both Interim and Full Accreditation. When applying for Interim Accreditation, please answer the Full Accreditation questions also. This will assist your transition from Interim to Full Accreditation.

When applying for Full Accreditation please note that many of the questions relating to Interim Standards require the applicant to confirm that no changes have been made to that Standard, or to submit further documentation where changes have occurred. Assessors will be asked to spot-check Interim Standards. All up-to-date copies of documents required by the Interim and Full Standards should be available to inspect by the Assessors during their site-visit.

Factsheets have been developed to give more information on how to approach and demonstrate achievement of certain standards. These are indicated in the Guidelines and included at the end of this document.

Organisations that operate more than one museum must submit a separate application form for each site.



## AGREED MINIMUM STANDARDS IN ALL CATEGORIES ■ ■ ■

### MANAGEMENT

- |                                     |  |
|-------------------------------------|--|
| <b>1. Constitution and policies</b> | <ul style="list-style-type: none"> <li>• Mission Statement (Interim)</li> <li>• Collection Policy (Interim)</li> <li>• Disposal Policy (Interim)</li> <li>• Loan Policy (Full)</li> </ul>  |
| <b>2. Museum management</b>         | <ul style="list-style-type: none"> <li>• Building Ownership and/or Lease Agreements (Interim)</li> <li>• Formal Written Agreement if the Collection is owned and managed by two Organisations (Interim)</li> <li>• Strategic Management Plan &amp; 1-Yr Annual Action Plan (Interim)</li> <li>• Financial Plan/Procedures &amp; Estimates (Interim)</li> <li>• Audited Accounts/Certified Statement of Accounts (Interim)</li> </ul> |

### COLLECTIONS MANAGEMENT

- |                                      |   |
|--------------------------------------|---|
| <b>3. Caring for the collection</b>  | <ul style="list-style-type: none"> <li>• Training in Care of Collections (Interim)</li> <li>• Evidence of Monitoring and Controlling the Museum Environment (Interim)</li> <li>• Safeguarding the Condition of the Collection (Interim)</li> <li>• Exhibitions Maintenance Schedule (Interim)</li> <li>• Disaster Response Procedures (Interim)</li> <li>• Disaster Plan (Full)</li> <li>• Care of Collections Strategy (Full)</li> </ul> |
| <b>4. Documenting the collection</b> | <ul style="list-style-type: none"> <li>• Entry Record System (Interim)</li> <li>• Accessions Register and Secure Copy (Interim)</li> <li>• Object Location and Movement Control (Interim)</li> <li>• Exit Records (Interim)</li> <li>• Plan for Documentation Backlog (Full)</li> <li>• Loan Agreements and Records (Full)</li> <li>• Catalogue (Full)</li> </ul>   |

### PUBLIC SERVICES

- |  |   |
|--|---|
| <b>5. Exhibition<br/>(long term and temporary)</b> | <ul style="list-style-type: none"> <li>• Consistent Approach to Labelling (Interim)</li> <li>• Budget for Exhibitions (Interim)</li> <li>• Visitor Survey and Evaluation of Exhibitions (Full)</li> <li>• Exhibition Policy (Full)</li> </ul>   |
| <b>6. Education</b>                                | <ul style="list-style-type: none"> <li>• Outline of Education Activities/Programmes (Interim)</li> <li>• Education Policy and Annual Action Plan (Full)</li> </ul>  |
| <b>7. Visitor Care and Access</b>                  | <ul style="list-style-type: none"> <li>• Receipting System if Admission Charged (Interim)</li> <li>• Clear External Signage with Opening Hours Displayed (Interim)</li> <li>• Telephone with Answering Service (Interim)</li> <li>• Toilet (Interim)</li> <li>• Visitor Numbers and Survey (Interim)</li> </ul> |

## ELIGIBILITY

**In order to participate in the Museum Standards Programme for Ireland (MSPI), each museum must first meet three eligibility criteria.** This is decided by means of an eligibility application process. Museums that complete the process, and are deemed eligible, may then be invited to join the programme and start the accreditation process.

To complete the eligibility application, museums must demonstrate that they meet all, or nearly all, of the eligibility criteria. Museums that meet nearly all of the eligibility criteria may be invited to join the MSPI programme on the understanding that, as part of the accreditation process, the 1st Assessment will indicate if there are any issues to be resolved regarding meeting the eligibility criteria. *MSPI participants must meet the eligibility criteria as well as the standards to be accredited.*

The eligibility application process is outlined below. An Eligibility Application Form is available from the MSPI coordinator. Please read the requirements at the top of each page carefully before completing the form. Submissions must be typed in narrative form. Museums located on multiple sites must complete a separate Eligibility Form for each of the sites.

### 1. MEETS THE DEFINITION OF A MUSEUM

**Please demonstrate how the museum meets each and every criterion of the museum definition below.**

#### Requirement

- (i) Applicants must demonstrate that their museum conforms to all elements of the museum definition, which has been agreed, for MSPI purposes, as follows:

***Museums are not for profit institutions that collect, safeguard, hold in trust, research, develop and interpret collections of original objects and original objects on loan, for the public benefit. They function publicly as places where people learn from and find inspiration and enjoyment through the display and research of original objects.***

- (ii) Applicants must either own all, or a significant part of, the collection or have the authority to apply on behalf of the owner. If a collection is owned by one organisation and managed by another, please clearly articulate who is responsible for each element of the museum definition.

#### Notes

Please structure your response under the following headings:

- (a) Not-for-profit
- (b) Collects
- (c) Holds in trust
- (d) Researches
- (e) Develops and interprets
- (f) Original objects and loans
- (g) For the public benefit
- (h) A place where people learn
- (i) A place where people find inspiration and enjoyment

## 2. CONSTITUTIONAL DOCUMENTS

Briefly describe how the museum is constituted. Please submit a copy of **one** of the constitutional documents.

- Deed of Trust ☐
- Act of the Dáil ☐
- Memorandum and Articles of Association ☐
- Constitution of a charitable organisation ☐
- Other (please define) ☐

### Requirement

- (i) Applicants are required to submit a copy of the museum's constitutional documents. The constitutional documents must reflect the curatorial and management functions of the museum. The authority and/or powers to operate a museum must also be demonstrated.

### Notes

Applicants will range from national, through local to specialist and corporate bodies. National and local authority institutions may have been established under an Act of the legislature, so in that case, a copy of the relevant Act should be submitted. In other cases, a legal document may have been drawn up to enable the establishment of a museum, such as a Deed of Trust or a Memorandum or Articles of Association.

Museums that were established by a larger parent organisation (university, local authority or diocese) must also submit documentary evidence of decisions taken by the parent body to establish the museum and their authority to do so.

Where an applicant is not incorporated or constituted in any legal form, one should submit copies of resolutions or meeting minutes that refer to the decision to establish the museum.

In exceptional cases, where documentary evidence is no longer available, one may submit a formal written declaration by the governors stating that they operate a museum under their current powers and confirming their commitment.

## 3. NATURE AND OWNERSHIP OF COLLECTIONS

Please describe the type of collections held by the museum. How many objects are in the collections? How many are borrowed and/or on loan?

Give details on who owns the collections. Briefly describe the museum's foundation and outline the subsequent development of the collections. Is the museum actively collecting? If the collection is closed or static, please give a reason.

### Requirements

- (i) Applicants must submit a description of each collection held by the museum. This must include the nature, type, and quantity of objects. An estimated total number of objects in the museum overall must also be included. An estimated number of objects borrowed and/or on loan must also be provided.
- (ii) Applicants must submit details on the ownership of the collections. If there is more than one organisation involved, the estimate proportion of objects owned by each body must be shown. The breakdown of ownership should be articulated as a percentage.

### Notes





Museums are either actively collecting, static (would collect but there are barriers, like storage space) or closed (their collection is complete). Since part of the definition of a museum is that the organisation 'collects', a valid reason for a collection being closed or static must be supplied.

It is important to clarify whether the applicant has a collection of its own or is the custodian of collections owned by other organisations. Where the collection, or a significant part of it, is not owned by the applicant, it is important to include a percentage breakdown of how much of the collection is owned by other organisations.

Please be aware that museums will be asked to resubmit, or possibly revise, their original Eligibility Form as part of the Accreditation application process.

## STANDARDS AND GUIDELINES


Colour guide for Standards and Guidelines text:

-  Application Form Questions
-  Minimum Standard for Interim or Full Accreditation
-  Requirements
-  Guidelines

## MANAGEMENT

### 1. CONSTITUTION AND POLICIES

#### Mission Statement

1.1  Please outline the museum's Mission Statement.

 This is a Minimum Standard for Interim Accreditation.


Please enclose formally approved documents along with your Application Form.

#### Requirements

- (i) Applicants must submit the Mission Statement of the museum.
- (ii) Applicants must submit evidence to show that the governing body has formally approved the Mission Statement. A signed and dated minute from the governing body will fulfil this requirement. It should clearly indicate the formal adoption of the Mission Statement by the governing body.

#### Guidelines

- A. A comprehensive Mission Statement should contain a clear statement of purpose on which all agree.
- B. It should present the museum and its work.
- C. It should state the museum's purpose, values, goals, functions and stakeholders.
- D. The aims and objectives of the museum should flow from the mission statement.
- E. The Mission Statement is a core document and other documents, including the Strategic Management plan (2.3 below) stem from it and must relate back to it.

1.2  Please identify the museum's general and special stakeholders.

#### Governance and Management

1.3  Please describe the management structure by providing a chart that:

- (a) Describes the organisational structure of the museum, including any sub-committees, management boards, or individuals that have powers delegated by the governing body for the governance and/or management of the museum.
- (b) Shows the level at which the senior museum management has access to this structure - please also indicate how often this takes place.

 Please enclose chart along with your Application Form.

1.4a  Where access involves attendance by the senior museum manager at meetings of the governing

body or any delegated committee, please indicate the membership of these committees/boards, the frequency with which their meetings are held, and whether or not formal minutes are taken.

1.4b ■ Are the meetings recorded and if so, are the minutes distributed?

## Policy Documents

1.5 ■ Please submit a copy of the museum's Collection Policy.

■ This is a Minimum Standard for Interim Accreditation.

Please enclose formally approved documents along with your Application Form.

### ■ Requirements

- (i) Applicants must submit a Collection Policy for the museum.
- (ii) Applicants must submit evidence to show that the governing body has formally approved the Collection Policy. A signed and dated minute from the governing body will fulfil this requirement. It should clearly indicate the formal adoption of the Collection Policy by the governing body.
- (iii) The Collection Policy must be discussed annually by the governing body, with a detailed review of the Policy conducted every five years.

### ■ Guidelines

Collection Policies vary for individual museums. It is recommended that applicants follow the proposed structure below, including all mandatory sections. The considerations listed as 'Optional' are variable factors and should be included in the policy where relevant to the museum in question.

The Collection Policy must include Sections A - E:

#### A. Museum background, history and current Collection Policy and practice

- (a) Document the current situation, identifying the strengths and weaknesses of the existing Collection Policy.
- (b) If there is no written Collection Policy, document the museum's collecting history.

#### B. Statement of type and quantity of collections

- (a) Document the nature of the present collections, including any substantial loans.
- (b) Quantify the collections within defined categories. State whether the collections are of local, national and/or international importance as a whole or on an individual/category basis as necessary.
- (c) State the ownership status of the collections and the proportion of objects on loan.

#### C. Statement of Acquisition Brief

State the museum's Acquisition Brief. Include all the mandatory elements below.

Mandatory:

- (a) State the essential nature of material to be collected (modern art, transport, etc)
- (b) State the museum's current collecting priorities
- (c) Document the geographical extent of the collecting area. State relationship with other collecting institutions and any agreements, actual or proposed, in relation to Acquisition Briefs and the avoidance of competition or conflict.
- (d) State whether the Acquisition Brief is active or static, giving reasons for this. If passive or inactive, limitations of resources will generally need to be stated and explained in detail. State any other reasons if applicable.
- (e) State policy on the acquisition and upkeep of archival and supporting documentation.



- (f) Provide details of any agreed modifications to the acquisition brief and the envisaged timescales for their introduction and implementation.
- (g) Policy in relation to objects reported or offered but not acquired.
- (h) If the Acquisition Brief is selective, define the criteria, (scientific, qualitative, specialised or geographic grounds, etc). Provide details of any spare parts, contemporary or otherwise, that it may be necessary to collect in order to maintain particular elements of the collection (engine parts, clockwork parts, etc).
- (i) State whether a purchase or specimens grant is available, or whether there is any possibility of obtaining such a grant. Elaborate and state priorities for its usage.
- (j) State who is responsible for the collections policy and Acquisition Brief within the museum's management structure, (e.g. curator only, management board and curator, management committee). State the mechanism for decision-making (monthly management meetings, signed documents, etc).
- (k) State whether objects are normally accepted on loan or accepted only in limited or particular circumstances. Provide details.

**D. Limitations – the factors that limit or confine the nature of Collection Policy and Acquisition Brief.**

Document the factors that limit the museum's Collection Policy. Include all the mandatory elements and the relevant optional areas.

Mandatory:

- (a) Legal constraints, both national and international.
- (b) Date limitations on collection where applicable.
- (c) Avoidance of duplication with other museums in the same geographical collecting area.
- (d) Space and storage limitations.
- (e) The collecting areas and types of materials that are excluded from the museum's Collection Policy.

Optional:

- (a) Specialised character of Acquisition Brief and status in museum constitution.
- (b) Defined geographical collecting area agreed by the governing body.
- (c) Available resources to deal with the demands of the collections.
- (d) Staff numbers and their expertise (or lack of).
- (e) Competition from other museums and or the commercial market place.
- (f) The need for resources to be employed in non-collection related areas.
- (g) Lack of information regarding available material or lack of availability of specific objects within museum's collection scope (none may be available or the whereabouts unknown).

**E. Obligations – commitments and responsibilities in respect of collections**

A range of support facilities to ensure the proper care of the collection is as important as the act of collecting. There is a need to operate an ethical approach to acquisition and collection management. Include all the mandatory elements.

Mandatory:

Consider the needs of the collections under the following headings:

- (a) Documentation and archiving.
- (b) Conservation.
- (c) Security – risk management and disaster planning.
- (d) Access to public and researchers.
- (e) Interpretation and display.
- (f) Research and publication.

**1.6 ■ Please submit a copy of the museum's Disposal Policy. If objects have been de-accessioned and/or disposed, please submit a fully completed sample of the records kept.**

**■ This is a Minimum Standard for Interim Accreditation.**

**Please enclose formally approved documents and fully completed sample records along with your Application Form**

**■ Requirements**

- (i) Applicants must submit a Disposal Policy for the museum.
- (ii) Applicants must submit evidence to show that the governing body has formally approved the Disposal Policy. A signed and dated minute from the governing body will fulfil this requirement. It should clearly indicate the formal adoption of the Disposal Policy by the governing body.
- (iii) Applicants must ensure that actions pertaining to the disposal of objects are fully documented. Object records for disposal of items and/or de-accessioned items must be maintained.
- (iv) The Disposal Policy must be discussed annually by the governing body, with a detailed review of the Policy conducted every five years.

**■ Guidelines**

Disposal Policies vary for individual museums. It is recommended that applicants follow the proposed structure below, including all sections relevant to their institution.

- A. De-accessioning is the formal removal of an acquired object from the museum's Accession Register. Decisions to de-accession must be made exceptionally. Disposal may arise in instances when objects have never been accessioned. This may arise when an object is offered to a museum and found to be of little or no interest or value. In this instance de-accessioning does not arise. Objects may also be disposed to another accredited museum in instances when the objects may or may not have been already accessioned. Donors should be made aware of a museum's decision to de-accession or dispose of objects which they have donated to the museum's collections.
- B. Disposal and de-accessioning should be considered in limited circumstances only. A minimal statement might be considered to the effect that disposal is only undertaken in exceptional circumstances. These circumstances should be outlined in the Disposal Policy.
- C. The potential reasons for disposal and de-accessioning could be as follows:
  - (a) Lack of title or other legal reasons including Government decision to repatriate objects acquired illegally.
  - (b) More appropriate to another museum and transferred accordingly.
  - (c) Condition: lack of facilities or resources to carry out necessary level of remedial work. Responsible provision needs to be made for an object's transfer to some other public institution in such circumstances.
  - (d) Condition: damaged or deteriorated beyond use.
  - (e) New scientific information which lessens or negates the importance of a given object.
  - (f) Transfer to other section within museum or organisation because of new scientific information or requirements.
- D. All records of de-accessioning and/or disposal should be kept. The accessions register, original accession information and catalogue should be annotated to record the disposal. The record of disposal should indicate:
  - (a) Reason for disposal
  - (b) That the object has been disposed

- (c) Method of disposal and new location of object, if relevant
- (d) Date of disposal
- (e) Signature of staff responsible

A photographic record of the disposed and/or de-accessioned object/s should be kept.

- E. Procedures in relation to the de-accessioning or disposal of any object must be formally discussed and approved by the museum's governing body. Individual curatorial decisions in this area should normally be approved in this way, except for minor instances involving, for example, non-artefact material.

## 1.7 ■ Please submit a copy of the museum's Loan Policy.

■ This is a Minimum Standard for Full Accreditation. Questions 4.10 - 4.12 also relate to this Minimum Standard.

Please enclose formally approved documents along with your Application Form.

### ■ Requirements

- (i) Applicants must submit a Loan Policy for the museum. The Loan Policy sets out the museum's principles on loans in and loans out. Agreements on in-coming and out-going loans flow from this policy document. Minimally, the policy must include the points listed on the Guidelines.
- (ii) Applicants must submit evidence to show that the governing body has formally approved the Loan Policy. A signed and dated minute from the governing body will fulfil this requirement. It should clearly indicate the formal adoption of the Loan Policy by the governing body.
- (iii) The Loan Policy must be discussed annually by the governing body, with a detailed review of the Policy conducted every five years.

### ■ Guidelines

#### A. Servicing loans

Decide whether the museum is currently in a position to service loans, either in or out. The safeguarding of all loan collections should be the highest priority. The Loan Policy should state that any loans will be accompanied by appropriate documentation and loan agreements. Loans granted should be justifiable in terms of their value to the recipient, the facilities required to service them, and should not place a disproportionate burden on either the borrower or the lender.

#### B. Recognised standards

Prioritise the development of a policy in relation to loans from the museum's collections to other institutions. The content of this policy should be based on recognised standards and should mirror the conditions required by other lending institutions.

#### C. Loans out

The policy on 'loans out' should be concerned with pragmatic issues and should include the following:

- (a) Appropriate loan agreements and contracts.
- (b) A requirement for venue inspection and facility reporting.
- (c) Provision of insurance on a 'nail to nail' basis from time of departure from the lending museum until its return there.
- (d) Insurance valuation should be at a level set by the lending institution using appropriate criteria.
- (e) Loan records - photographic and written condition reports should be completed and signed by the parties to the loan at points of exit and entry.
- (f) The lending museum must be allowed to nominate a staff member to personally courier the loan to the receiving institution and at the borrower's expense.

- (g) The lending museum should never be at a financial loss as a result of loaning an object. Costs should be specified in advance. It should be stated that the borrowing museum must meet all reasonable costs of the loan. This may vary somewhat where a museum has a resourcing or networking responsibility to other institutions (e.g. this might apply to county museums and national institutions).
- (h) Regulations regarding the packing, transport and installation and handling of loan material during the loan period. This is usually restricted to personnel of the lending museum except in cases of emergency.
- (i) A minimum standard of security in the borrowing museum should be specified. This should include detail concerning building access, case security, fire protection, and the provision of appropriate alarms.
- (j) Copyright, intellectual property, photographic, filming rights and publication rights should be addressed. Copyright can be an important entitlement attaching to objects and collections. Copyright ownership frequently needs to be both protected and exploited.
- (k) Appropriate rights forms and documents need to be used where necessary.
- (l) Correct environmental conditions and case design allowing for adequate lighting, humidity, and temperature and security control should be documented.
- (m) A loans database and/or loans register should be established and maintained.

#### D. Loans in

Loans-in from sister institutions with similar standards are likely to be broadly similar to the points specified above, but museums should expect to be required to meet the specific loan conditions of the lending institution which may vary depending on the nature of the loan.

A specific policy should be developed in relation to long-term loans to the collections from sources other than sister institutions. When dealing with the prospect of loans from private individuals, it is far preferable to acquire full title instead. It may be desirable to place a limitation on the acceptance of such loan arrangements but allowing some discretion to the curator or board of management to provide for exceptional circumstances.

#### E. Designation

The issue of designation under the terms of the National Cultural Institutions Act 1997 is at present relevant only to those museums and their curators that are empowered to acquire archaeological objects on behalf of the State and that are in the ownership and control of local authorities. If this status applies to a museum, then a statement in relation to a museum's designated status should be included.

### 1.8 ■ Please outline the museum's key aims and objectives.

## 2. MUSEUM MANAGEMENT ■ ■ ■ ■

### Ownership

#### 2.1 ■ Give details on the museum building(s) ownership, and submit a copy of the lease agreement (terms and conditions/start date), if applicable.

■ This is a Minimum Standard for Interim Accreditation.

Please enclose the relevant additional documents along with your Application Form.

#### ■ Requirements

- (i) Applicants must give details of building ownership or submit lease agreements, if applicable.

- (ii) Any off-site storage facilities must be covered by separate leasing agreements.
- (iii) Lease agreements must be in writing, and if the term is less than one year, the museum must demonstrate plans for the following year.

**2.2 ■ Give details on the ownership of the collection(s). If the collection(s) is/are owned and managed by separate organisations, please submit a copy of the formal written Management Agreement between parties.**

■ **This is a Minimum Standard for Interim Accreditation.**

**Please include the formal written Management Agreement; formal approval by governing body; and constitutions/terms of reference for both parties along with your Application Form.**

#### ■ Requirements

- (i) If the museum collection is owned and managed by two separate organisations, applicants must submit a copy of the formal written Management Agreement between both bodies.
- (ii) Applicants must submit evidence to show that the governing body has formally approved the Management Agreement. A signed and dated minute from the governing body will fulfil this requirement. It should clearly indicate the formal adoption of the Management Agreement by the governing body.
- (iii) Applicants must submit a copy of the constitution/terms of reference for both organisations.

#### ■ Guidelines

- A. The formal written Management Agreement should be signed and dated by both parties.
- B. It must include provisions for reporting, review and termination of the agreement.
- C. It should contain clear statements of responsibility for collecting, stating who collects and who acquires title for additions to the collections.
- D. The Management Agreement must show authority of the owners to hold collections, to divest themselves of collections and to lend collections.
- E. The Management Agreement should be accompanied by:
  - (a) Copy of constitution or terms of reference of the managing body.
  - (b) Copies of constitution or terms of reference of the owners, detailing remit, composition, powers.

## Strategic Management

■ See also Factsheet 1: Developing a Strategic Management Plan.

**2.3 ■ Please submit the museum's Strategic Management Plan and current Annual Action Plan.**

■ **This is a Minimum Standard for Interim Accreditation.**

**Please enclose formally approved documents along with your Application Form.**

#### ■ Requirements

- (i) Applicants must submit a Strategic Management Plan and current Annual Action Plan for the museum.
- (ii) Applicants must submit evidence to show that the governing body has formally approved the Strategic Management Plan and Annual Action Plan. A signed and dated minute from the governing body will fulfil this requirement. It must clearly indicate the formal adoption of the Strategic Management Plan and Annual Action Plan by the governing body.

#### ■ Guidelines

- A. Strategic Management Plan (SMP) is a medium to long-term plan and usually covers a three to five

year period. It is an overarching plan and encompasses all areas of museum management, including those that relate to other Minimum Standards. For example, the Financial Plan (Question 2.6) and the Exhibition Budget (Question 5.2) will relate back to the financial and budgeting elements of the SMP. Similarly the Care of Collections Strategy (Question 3.20) and the Education Policy and Education Policy Annual Action plan (Question 6.6) stem from the SMP. The SMP itself will relate back to the Mission Statement. Before you submit your Application Form, please ensure that these documents are consistent with each other.

- B. A SMP provides clear purpose for the work of the museum and for recording achievement. Led by managers, all plans are best developed through an internal process of discussion and review. In a small museum with no more than ten staff, this process should be completed within 2-3 months. Larger museums will require longer to allow for the development of individual departmental contributions. One should also build in the time required to consult externally, with stakeholders such as the education sector.
- C. Components of a Strategic Management Plan  
A SMP consists of an introductory narrative followed by a series of tables. Although presentation and terminology will differ, a SMP typically includes the following:
  - (a) Mission Statement
  - (b) Overview
  - (c) Situation review
  - (d) Financial projections
  - (e) Strategic aims (or goals)
  - (f) Objectives
  - (g) Performance measures
  - (h) Review mechanism
- D. An Annual Action Plan should be submitted with the SMP.
- E. Realistic performance indicators should be assigned to the goals in the SMP.
- F. Please see Factsheet 1: Developing a Strategic Management Plan for further details.

## Staffing

- 2.4 ■ Please submit a staff organisational chart for the museum. Include details on the number of staff; their positions in the museum; and whether they are full-time, part-time, permanent or temporary, trainees, voluntary or paid, male or female.

■ Please enclose the relevant additional documents along with your Application Form.

## Security

- 2.5 ■ What security systems are in place to provide protection against fire and theft?

## Financial Management

■ See also Factsheet 2: Finance (relates to Question 2.6 and 2.7)



**2.6 ■ Please submit a copy of the museum's Financial Plan and/or details of financial procedures and proposed estimates.**

■ **This is a Minimum Standard for Interim Accreditation. This Minimum Standard also relates to Question 2.3.**

Please enclose formally approved documents along with your Application Form.

#### ■ Requirements

- (i) Applicants must submit a copy of the museum's current Financial Plan and/or procedures and estimates.
- (ii) Applicants must submit evidence to show that the governing body has formally approved the Financial Plan and/or estimates. A signed and dated minute from the governing body will fulfil this requirement. It should clearly indicate the formal adoption of the Financial Plan and/or estimates by the governing body.

#### ■ Guidelines

- A. The Financial Plan must be completed annually.
- B. The Financial Plan should include:
  - (a) Projections for income and expenditure for two years, including the current year.
  - (b) Disaggregated figures are required, at least in summary form, if the museum's figures are usually presented as part of a larger corporate financial report.
- C. The financial procedures and estimates should include:
  - (a) An outline of financial procedures and details on the current year's budget.
  - (b) Proposals for estimates for the following year, if available.

**2.7 ■ Please submit a copy of the Audited Accounts or Certified Statement of Accounts from the most recent 2-year period.**

■ **This is a Minimum Standard for Interim Accreditation.**

Please enclose the relevant additional documents along with your Application Form.

#### ■ Requirements

- (i) Applicants must submit a copy of the Audited Accounts or Certified Statement of Accounts from the most recent 2-year period.

#### ■ Guidelines

- A. The annual accounts of the museum will meet this requirement but they must be independently certified or approved.
- B. If the accounts are audited, please submit accounts for the two previous years.
- C. If the accounts are certified, please submit statement of accounts for the previous two years that have been certified by an accountant.
- D. Large corporate bodies, such as local authorities or departments of government may submit two year's accounts that have been signed by accounting officers or finance officers.

## COLLECTIONS MANAGEMENT ■ ■ ■ ■

### 3 CARING FOR THE COLLECTION ■ ■ ■ ■

#### Building Assessment

- 3.1 ■ Please describe the museum building(s). Submit a photograph of the exterior and a floor plan. Include details of the age of the building, and whether it is purpose-built or converted from previous use.

■ Please enclose the relevant additional documents along with your Application Form.

- 3.2 ■ Please describe the museum's building maintenance routine. Include a copy of the building maintenance schedule with details of the frequency and type of maintenance carried out and the person/s responsible for managing building maintenance.

■ This is a Minimum Standard for Interim Accreditation (Safeguarding the Condition of the Collection). Please enclose the relevant additional documents along with your Application Form.

#### ■ Requirements

- (i) This minimum standard focuses on basic practice which is essentially a good housekeeping routine. Applicants must check the exterior and interior of the museum building/s and any storage facilities (on-site and off-site) at least once a year. A log book must be kept listing all services, names and addresses of maintenance firms, details (dates and names) of service and repairs carried out.
- (ii) Applicants must submit a written building maintenance schedule. This should record the person who checks the building, date, and type of maintenance carried out.
- (iii) If two organisations are involved in managing the museum, the person responsible for Collections Care should liaise with the owners of the building regarding its maintenance.

- 3.3 ■ Please describe the museum's pest control measures.

Include the following information:

- Details of frequency of checks for pest infestations.
- Details of insect traps and how often they are checked.
- Details of how newly acquired material is 'quarantined' for infestation (mould or insect) before adding to the collection.
- Details on how any infestations are or would be dealt with once identified.

■ This is a Minimum Standard for Interim Accreditation (Evidence of Monitoring and Controlling the Museum Environment).

#### ■ Requirements

- (i) Applicants must take the necessary steps to minimise the risk of pest infestation.
- (ii) Applicants must be prepared to deal with an infestation should it be identified.

#### Training in Care of Collections

- 3.4 ■ Who has overall responsibility for co-ordinating Collections Care?

- 3.5 ■ Does the museum have access to professional conservation/preservation advice? Does the museum have conservation workshop facilities?

### 3.6 ■ Who is responsible for the day-to-day implementation of Collections Care?

■ This is a Minimum Standard for Interim Accreditation (Training).

#### ■ Requirements

A museum must fulfil one of the following:

- (i) The museum has a conservator as a member of staff.
- (ii) The museum has a conservation technician as a member of staff.
- (iii) The museum has assigned a staff member with responsibility for collections care. The museum has access to professional conservation/preservation advice on a regular basis or when a problem is identified.

### 3.7 ■ What members of staff and/or volunteers receive training in Collections Care?

■ This is a Minimum Standard for Interim Accreditation. Questions 3.8 and 3.9 also relate to this Minimum Standard (Training).

#### ■ Guidelines

**Note:** Given the shortage of dedicated collections care training courses in Ireland, it is difficult to quantify this Standard. The Standard aims to ensure that a staff person or volunteer in the museum has the knowledge and expertise to implement all the standards in the Caring for Collection category or to access external professional expertise if required.

To fulfil this standard:

- A. Give details and dates of all Collections Care courses attended.
- B. The conservator, conservation technician or member of staff responsible for Collections Care, must assess the requirements in the museum and identify any areas in which they lack the in-house skills to effectively implement the Care of Collections Strategy. The training needs should then be discussed with the museum director/curator and relevant accredited courses are attended by the conservator, conservation technician or other staff where relevant. If that is not possible, external professional expertise should be sought.
- C. A series of courses in Caring for the Collection will be organised in conjunction with the MSPI. Achievement of the MSPI Standards is a phased process and when a museum meets Full Accreditation, applicants will be expected to have undertaken training in all relevant matters relating to collections care, where required.

### 3.8 ■ Please provide details of **in-house** experience and **in-service** training in Collections Care.

■ This is a Minimum Standard for Interim Accreditation, see 3.7 above.

### 3.9 ■ Please provide details of **external** training in Collections Care received in the last five years.

■ This is a Minimum Standard for Interim Accreditation, see 3.7 above.

## The Museum Environment

**3.10 ■ Please describe the environmental conditions in the museum with regard to the following: heat, relative humidity, and light. Explain how these conditions are measured and recorded.**

Include the following information:

### Temperature

- Type of heating system in the museum.
- Equipment used to measure temperature.
- Details of records kept and how this information is used.
- Details of frequency of readings.
- Details on how fluctuations in temperature and RH are minimised.

### Relative Humidity

- Details of equipment used to control relative humidity.
- Equipment used to measure relative humidity.
- Details of frequency of readings.
- Details of records kept and how this information is used.

### Light

- Detail on how your collections on display are lit
- Details of how light levels in the museum are measured and recorded.
- Details of the amount of light and the length of time to which objects are exposed.
- Details of steps taken to exclude ultraviolet light.

### Pollutants

- Details of steps taken to protect objects from gaseous pollutants.
- Details of steps taken to minimise dust and particulate dirt.
- Details of the cleaning regimen in place to remove dust and dirt from the museum.

**■ This is a Minimum Standard for Interim Accreditation (Evidence of Monitoring and Controlling the Museum Environment).**

**Please enclose the relevant additional documents along with your Application Form.**

### ■ Requirements (temperature)

- (i) Applicants must be able to measure and record temperature regularly.
- (ii) Applicants must keep consistent records and submit a sample of the completed records.
- (iii) Applicants must submit evidence that efforts are made to maintain a stable environment. Extremes of temperature must be avoided.

### Requirements (relative humidity)

- (i) Applicants must be able to measure and record the level of relative humidity regularly.
- (ii) Applicants must keep consistent records and submit a sample of the completed records.
- (iii) Applicants must submit evidence that efforts are made to maintain a stable environment. Large fluctuations in relative humidity should be avoided.

### Requirements (light)

- (i) Every effort should be made to minimise the exposure of the artefacts on display and in storage to light.
- (ii) Applicants must be able to measure and record light and Ultraviolet levels (access to a light meter is required).
- (iii) Ultraviolet (UV) radiation must be minimised or eliminated.
- (iv) Applicants must submit a sample of the records kept.

### Requirements (pollutants)

- (i) Sources of dust, dirt and gaseous pollutants should be minimised.

### ■ Guidelines

- A. This standard focuses on basic practice which is essentially a good housekeeping routine. A regular walkabout of all areas (at least once a week), especially storage (on-site and off-site), and display areas should be undertaken and anything amiss noted. It is not essential to have elaborate equipment to measure environmental conditions. What is required is that there is an understanding of the environmental conditions and their impact on the collection, and evidence that, in so far as funds are available, measures are in hand to improve any conditions that might be impacting unfavourably on the collection.
- B. Frequency will be dictated by the funding available to the museum. The options are: inexpensive equipment which does not record temperature and humidity on a continuous basis; expensive equipment that records continuously and may be capable of sending signals back to a remote data-logger; or thermohygrographs that record continuously using a weekly or monthly chart. In the absence of instruments that record continuously, it is recommended that readings should be taken every day if possible or at least once weekly.
- C. Please see Section 1.4 of *Caring for Collections: A Manual of Preventative Conservation* for further details.

## Storage

### 3.11 ■ Please give details of the collection storage areas (on-site and off-site) and describe how objects are protected. Include details on:

- All storage locations on-site and off site
- The store plan(s) and how artefacts are organised.
- How different sized objects and material types are stored.
- Any variations in environmental conditions between the exhibition spaces and the storerooms/storage areas.
- The monitoring and cleaning routine for storage areas.
- Any objects stored off-site or areas such as offices and how they are protected.

### ■ This is a Minimum Standard for Interim Accreditation (Safeguarding the Condition of the Collection).

### ■ Requirements

- (i) Applicants must have a routine in place which offers adequate protection to the objects in storage.
- (ii) Monitoring and cleaning routines must include storage areas as well as display areas.

### 3.12 ■ Please describe the types of storage material used. Include details on:

- Type of materials used to fit out the storage areas (e.g. shelving, racking, cabinets)
- Housing materials used to protect the collection while in storage and during handling (e.g. boxes, folders, plastic sheeting, crates)

### ■ This is a Minimum Standard for Interim Accreditation (Safeguarding the Condition of the Collection). This Minimum Standard also relates to Question 3.11 above.

### ■ Guidelines

- A. Please see Section 3.6 of *Caring for Collections: A Manual of Preventative Conservation* for further details
- B. It is recommended that:

- (a) All newly purchased storage materials are of archival quality.
- (b) All non-archival storage materials are being replaced on a phased basis.
- (c) Participants should seek advice from a conservation professional if unsure which housing materials are appropriate for different collection types.
- (d) All photocopying and printer equipment be accommodated separately from storage areas.

**3.13 ■ Are the museum's existing storage areas adequate? Are there plans in place to deal with additional storage requirements?**

## Display

**3.14 ■ What measures are taken to ensure that objects on display are not damaged or do not deteriorate? Describe how the collections are protected from:**

- Vandalism and theft
- Over-exposure to light
- Unstable environmental conditions
- Damage caused by unsuitable display materials
- Damage caused by unsuitable exhibition supports/mounts
- Mishandling

**■ This is a Minimum Standard for Interim Accreditation (Safeguarding the Condition of the Collection).**

### ■ Requirements

- (i) Applicants must have a routine in place which offers adequate protection to the objects on display.

### ■ Guidelines

Please see Section 3.7 of *Caring for Collections: A Manual of Preventative Conservation* for further details.

- A. To ensure the preservation of the collections, it is recommended that all items on display are routinely rotated. Consideration should be given to the amount of light highly sensitive objects should be exposed to annually, as well as other environmental considerations and/or security costs.

**3.15 ■ Please describe the maintenance routine in place for exhibitions. Submit a copy of the maintenance schedule for exhibitions, including details of person responsible, frequency and type of maintenance carried out.**

**■ This is a Minimum Standard for Interim Accreditation (Safeguarding the Condition of the Collection). Please enclose the relevant additional documents along with your Application Form.**

### ■ Requirements

- (i) Applicants must demonstrate that there is a regular, written maintenance schedule in operation, including details of the person responsible, the frequency of its operation, and information about seasonal closure where applicable.
- (ii) Applicants must submit a copy of the written maintenance schedule.

### ■ Guidelines

- A. This minimum standard focuses on basic practice which is essentially a good housekeeping routine. A regular walkabout (weekly) of all areas should be undertaken and anything amiss noted. Museums should demonstrate that there is a cleaning schedule for the exhibition space, to include dusting down and cleaning of exterior surfaces of display cases, etc.



- B. Scheduled inspection and cleaning of interiors of display areas and objects for dust, insects, deterioration should be carried out.
- C. Display cases and mounts should be checked to ensure that they are in good working and decorative order.
- D. With regard to 'long-term' exhibitions, evidence of an object rotation regime should be in place for purposes of variety and/or preservation of collection.
- E. All electrical and audio-visual elements in the exhibition should be in working order. Spare supplies (e.g. bulbs) should be kept in stock. A service contract or arrangements for prompt repair of audio-visual equipment should be in place.

## SAFEGUARDING THE COLLECTION ■■■■

See also

Factsheet 3: **Condition Assessment** (relates to Question 3.18)

Factsheet 4: **Drawing up a Disaster Plan** (relates to Question 3.19 and 3.20).

Factsheet 5: **Writing a Care of Collections Strategy** (relates to Question 3.21)

Factsheet 6: **Care of Collections Situation Review** (relates to Question 3.21)

### Condition Assessment

**3.16 ■■** Has the museum identified risks particular to its collection?

**3.17 ■■** Has an assessment of the condition of all or part of the museum's collection been undertaken?  
When was it carried out? Who conducted the assessment? Please give details of any records kept.

**3.18 ■■** What percentage of the museum's collection is in:

Good Condition	___%
Fair Condition	___%
Poor Condition	___%
Unknown Condition	___%

**■ This is a Minimum Standard for Interim Accreditation (Safeguarding the Condition of the Collection).**

#### ■ Requirements

- (ii) Applicants must have a basic knowledge of the condition of the collection(s), both on display and in storage.
- (iii) Applicants must take reasonable steps to preserve and protect the collection(s).

#### ■ Guidelines

- A. What is required is that someone in the museum is familiar with the collection, assesses the collection as best as he/she can and records the condition. A watchful eye should be kept to ensure that the condition of the collection is not changing or deteriorating due to changes in environmental conditions, pest infestation, the materials in which they are housed, poor handling or unsuitable storage.
- B. The condition of an object is not easily defined. Within the accreditation scheme, it is recommended

that the condition may be considered 'an evaluation of the ability of the object to function within the collection' and that this can be rated in terms of Good condition, Fair condition and Poor condition. By function is meant the ability to display/exhibit, consult and loan. This in turn may be measured against the importance of the object to the collection, its value and uniqueness.

- C. Please see Factsheet 3: Condition Assessment for further details.

## Disaster Planning

### 3.19 ■ Please give details of the museum's Disaster Response Procedures.

#### ■ This is a Minimum Standard for Interim Accreditation

##### ■ Requirements

- (i) Applicants must submit a copy of the Disaster Response Procedures.
- (ii) Applicants must seek the advice of the local fire brigade chief and the local Gardaí.
- (iii) Applicants must identify alternative storage locations in the event of a disaster which requires evacuation of the collection, and if possible, arrange transport thereto.

##### ■ Guidelines

- A. The Disaster Response Procedures should include a list of names in order of priority, contact numbers and a note of each person's role in an emergency.
- B. Please see Factsheet 4: Drawing up a Disaster Plan for further details

### 3.20 ■ Please submit a copy of the museum's Disaster Plan.

#### ■ This is a Minimum Standard for Full Accreditation.

Please enclose formally approved documents along with your Application Form.

##### ■ Requirements

- (i) Applicants must submit a Disaster Plan for the museum.
- (ii) The Disaster Plan must be reviewed every three years. In the event of a disaster or emergency, or any structural alteration, applicants must review the Disaster Plan and procedures and revise if necessary.
- (iii) Applicants must submit evidence that the Disaster Plan has been formally approved by the governing body. A signed and dated minute approval should be obtained after each review. It should clearly indicate the formal adoption of the Disaster Plan by the governing body.
- (iv) A Fire Safety Manual must be attached to the Disaster Plan.

##### ■ Guidelines

- A. Prior to drafting the Disaster Plan, museums should conduct a risk assessment. This includes:
  - a) Maintenance: Ensure that the building is well maintained to reduce the possibility of a disaster occurring.
  - b) Ensure that all systems such as alarm systems, emergency lighting, generators, fire detectors, fire extinguishers, 'hot' phone lines, security cameras are checked regularly. Record the dates when they are checked and when a malfunction was repaired.
  - c) Security: Consult the Gardaí (crime prevention section). Follow their recommendations.
  - d) Fire: Consult the Fire Service. Follow recommendations.
  - e) Flood: Avoid storing artefacts in the basement. If this is unavoidable, try to store them a few

inches above the floor.

**B. The Disaster Plan:**

- a) Appoint someone with overall responsibility for responding to an emergency. Appoint a deputy. Form a 'disaster team'.
- b) List the phone numbers of the key holder(s), emergency services, including medical services, staff, suppliers and conservators. Update regularly.
- c) Draw up a salvage priority list the most important artefacts in the collection and try to have them photographed. Keep a copy off-site. Ensure security of lists.
- d) Select alternative accommodation in the event of needing to evacuate the collection. Arrange for transportation thereto. Select freeze-drying facilities. Prepare a list of conservators.
- e) Draw up a set of emergency procedures. In consultation with the Fire Service, select an assembly point away from the building.
- f) A Fire Safety Manual should be attached to the Disaster Plan.

**C. Actions:** As a follow-on from drafting the plan, museums should:

- a) Hold regular disaster team meetings (at least every six months).
- b) Carry out regular evacuation drills.
- c) Stock disaster bin/s with key supplies to enable swift disaster response in-house.

**D.** Please see Factsheet 4: **Drawing up a Disaster Plan** for further details

## Care of Collections Strategy

### 3.21 ■ Please submit the museum's Care of Collections Strategy.

■ **This is a Minimum Standard for Full Accreditation.**

Please enclose formally approved documents along with your Application Form. This standard also relates to question 2.3

■ **Requirements**

- (i) Applicants must submit a Care of Collections Strategy for the museum.
- (ii) Applicants must submit evidence that the Care of Collections Strategy has been formally approved by the governing body. A signed and dated minute from the governing body will fulfil this requirement. It should clearly indicate the formal adoption of the Care of Collections Strategy by the governing body.

■ **Guidelines**

- A. The Care of Collections Strategy is a plan of action which has been prompted by an evaluation of the museum's activities in each of the following areas:
  - (a) Exterior and interior condition of the building and maintenance schedule
  - (b) Environmental conditions
  - (c) Environmental monitoring
  - (d) Objects
  - (e) Handling and access
  - (f) Storage
  - (g) Exhibition
  - (h) Disaster planning
  - (i) Training

- B. Applicants are advised to read carefully the requirements and guidelines for the minimum standards in Caring for the Collection (Section 3 above) prior to their evaluation of the current situation in their museums. To conduct the evaluation, a template is given in the **Care of Collections Situation Review** Factsheet. This template follows the book: *Caring for Collections: A Manual of Preventive Conservation*. Page references are given.
- C. After the evaluation has been completed, the Care of Collections Strategy should be developed through an internal process of discussion and review involving a number of key members of staff. It needs to be directly linked to the Institution's Strategic Management Plan (SMP) (see Question 2.3). The aims and objectives identified should act as a declaration of intent with respect to the preservation of the collections over a period of years. The timescale and costs related to achieving objectives should be indicated. The Factsheet: **Writing a Care of Collections Strategy** gives a template for writing the Strategy.
- D. The aims and objectives of the Care of Collections Strategy should link to the museum's Strategic Management Plan. The implementation of actions deriving from the aims and objectives of the included in the museum's Annual Action Plan. The Factsheet **Writing a Care of Collections Strategy** gives a template for writing the Plan.

Please see Factsheet 5: **Writing a Care of Collections Strategy** and Factsheet 6: **Care of Collections Situation Review** for further details.

## 4. DOCUMENTING THE COLLECTION ■■■■

### ■ Requirements

The Museum Standards Programme requires that all applicants have a Documentations Procedural Manual. This manual defines procedures related to documenting the collection.

A Procedural Manual is a set of clear instructions that describe how a museum records, maintains, and secures information it holds about its collections. It sets out the documentation procedures and practices of a museum so that information about its documentation system is available to all museum staff, ensuring accountability, consistency and continuity of practice. A Procedural Manual must be reviewed on a regular basis to maintain its currency.

### Entry Records

- 4.1 ■ Please submit the museum's entry record procedure defined in the Documentation Procedural Manual. Submit a fully completed sample entry record.

■ This is a Minimum Standard for Interim Accreditation.

Please enclose the entry record procedure and the relevant fully completed sample records along with your Application Form.

### ■ Requirements

The entry record system is a system to record the entry of all objects into the museum except loans.

- (i) Applicants must have an object entry procedure and written procedures defined in a Documentation Procedural Manual.

- (ii) Applicants must have an entry record for all objects deposited in its care after implementation of the entry record procedure.
- (iii) Each entry record must have an entry unique number assigned to the object or group of objects (the entry number is different from the accession number).

### ■ Guidelines

- A. The entry record should:
  - (a) Establish an audit trail for the object/s for accountability purposes.
  - (b) Enable relevant information to be associated with the object/s (e.g. transfer of title documentation).
  - (c) Establish ownership and legal title to the object/s.
  - (d) Establish the terms and conditions of the museum for the acceptance of the object/s.
  - (e) Establish the extent of the museum's liability.
  - (f) Establish the purpose and method of the object/s deposit.
  - (g) Establish a timescale for review of the object (e.g. date of return of the object to owner).
  - (h) Record a brief description of the object/s.
  - (i) Record the number of objects.
  - (j) Record non-intrinsic information relevant to the object (e.g. history of object).
  - (k) Enable return of object/s to owner/depositor.
  - (l) Provide a receipt for the owner/depositor.
  - (m) Be signed and dated by both depositor/owner and museum representative.
- B. The entry record number is not, nor should it become, the accession number.
- C. Loan of objects to the museum should be dealt with under separate procedures (see Question 4.10).
- D. This may be a convenient time to get title transferred.

## Accessions Register and Secure Copy

**4.2 ■ Please submit the procedure defined in the Documentation Procedures Manual giving the procedures to accession acquisitions to the permanent collection. Submit a fully completed sample record.**

**■ This is a Minimum Standard for Interim Accreditation. Questions 4.3 and 4.4 also relate to this Minimum Standard.**

**Please enclose the accession record procedure and relevant fully completed sample records along with your Application Form.**

### ■ Requirements

The Accessions Register is the permanent record of all the objects in the collection, past or present.

- (i) Applicants must have a written procedure defined in a Documentation Procedural Manual to accession acquisitions (whether by gift, purchase or bequest) to the permanent collection.
- (ii) Applicants must have a written procedure for marking objects defined in the Documentation Procedure Manual.
- (iii) Each object must be assigned a unique identifier (accession number) and this identifier should be attached to or marked on the object.
- (iv) Applicants must have a permanently bound Accessions Register/s.
- (v) Applicants must ensure that title has been transferred for all objects prior to accessioning.
- (vi) Applicants must define the accessioning authority.
- (vii) The accessioning authority must ensure the integrity of the accession records.

- (viii) The applicant must ensure security of both the original register/s and copies. These must be kept securely in separate locations.

#### ■ Guidelines

- A. For accountability purposes, the applicant should define the authority required for the accessioning of objects to the permanent collection. This may be the governing authority or authority may be delegated (see Question 1.5 on Collection Policy).
- B. Accessions Registers may be hand-written or created from a computerised database.
- C. When Accessions Registers are created from a computerised system they must be printed on archival quality paper with a durable print medium and signed and dated by the accessioning authority.
- D. Accessions Registers should be compiled on a yearly basis.
- E. It is preferable that the Accessions Register(s) should be securely kept, preferably in a fire-proof safe.
- F. A minimum Accessions Record should include:
  - (a) Accession number, unique identifier for each object.
  - (b) Brief description of object/s.
  - (c) Number of objects.
  - (d) Reference to acquisition documentation (e.g. entry form number and transfer of title).
  - (e) Method of acquisition.
  - (f) Source.
  - (g) Date of entry to accessions register.
  - (h) Signature of accessioning authority (see Question 1.5 on Collection Policy).

- 4.3 ■ Please describe the secure back-up copy of the Accessions Register(s)? Give details of the storage location used.

■ This is a Minimum Standard for Interim Accreditation.

#### ■ Requirement

- (i) The applicant must ensure the security of the back-up copy the Accession Register(s). Back-ups must be kept securely in a separate location to the original.

#### ■ Guidelines

- A. A hard copy of the Accessions Register(s) should be securely kept, preferably off-site.

- 4.4 ■ How are objects marked when accessioned?

■ This is a Minimum Standard for Interim Accreditation.

## Object Location and Movement Control

- 4.5 ■ Please submit the object location record procedure defined in the Documentation Procedural Manual. Submit a fully completed sample record.

■ This is a Minimum Standard for Interim Accreditation. Question 4.6 also relates to this Minimum Standard.



Please enclose object location procedure and the relevant fully completed sample records along with your Application Form.

#### ■ Requirements

Object location provides an audit trail for all objects in the collection.

- (i) Applicants must have an object location record procedure and written procedures defined in a Documentation Procedural Manual.
- (ii) Applicants must have a location record for all objects.

#### ■ Guidelines

- A. Each object should have a record detailing the normal location.
- B. Location information should be accessible by object number and by location name.
- C. Location records should be kept in a secure place.

**4.6 ■ Please submit the object movement record procedure defined in the Documentation Procedural Manual. Submit a fully completed sample record.**

#### ■ This is a Minimum Standard for Interim Accreditation.

Please enclose object movement procedure and the relevant fully completed sample records along with your Application Form.

#### ■ Requirements

Object movement control provides an audit trail for all objects in the collection.

- (i) Applicants must have an object movement record procedure and written procedures defined in a Documentation Procedural Manual.
- (ii) Applicants must have up to date records of all object movements.

#### ■ Guidelines

- A. Movement of objects to temporary locations should be recoded at the time of movement.
- B. The movement record should include:
  - (a) Accession number of the object
  - (b) Previous location
  - (c) New location
  - (d) Person moving the object
  - (e) Date of the move
  - (f) Signature of the mover
- C. When manually recorded movement records are transferred to computerised systems the manual record should be annotated at time of update and updates should be regular.

### Exit Records (Collection)

**4.7 ■ Please submit the museum's exit record defined in the Documentation Procedural Manual. Submit a fully completed sample exit record.**

#### ■ This is a Minimum Standard for Interim Accreditation.

Please enclose the exit record procedure and the relevant fully completed sample records along with

## your Application Form.

### ■ Requirements

- (i) Applicants must have an object exit procedure and written procedures defined in a Documentation Procedural Manual.
- (ii) Applicants must be able to account for the exit of each object from the museum premises for whatever reason and whether or not the object belongs to the permanent collections.
- (iii) Applicants must ensure that an audit trail is maintained for an object leaving the custody of the museum.
- (iv) Location information for accessioned objects must be updated on exit (see Question 4.5).

### ■ Guidelines

- A. Entry documentation may include provision for signature on return of the object to the owner/depositor.
- B. Receipts should be prepared for all objects from the permanent collections exiting the museum (e.g. on loan, conservation).
- C. Short term exits where objects are in the care of a member of staff (e.g. lectures) should be recorded.

## Documentation Backlog

**4.8 ■ Describe the documentation backlog in the museum. Give details of the different record types.**

**4.9 ■ Please outline the museum's plan to deal with documentation backlog.**

### ■ This is a Minimum Standard for Full Accreditation.

Please enclose the relevant additional documents along with your Application Form.

### ■ Requirements

- (i) Applicants must have a plan to deal with any documentation backlog e.g. object entry, accessioning, unmarked objects or cataloguing.
- (ii) Applicants must state the timescale to deal with the backlog.

### ■ Guidelines

- A. An assessment should be made of the documentation backlog including:
  - (a) Size of the backlog
  - (b) Current state of documentation
  - (c) Sources of information
  - (d) Quality of information
- B. A plan to deal with the backlog should be written including:
  - (a) Statement of the current documentation situation
  - (b) Estimate of the backlog in terms of object numbers or records to be processed
  - (c) Statement of retrospective documentation to be carried out (e.g. inventory record, catalogue record and/or accession record for each object)
  - (d) Estimate of the timescale to deal with each object
  - (e) Estimate of resources needed to complete the elimination of the backlog
- C. Implementation of object entry, accessioning and written catalogue procedures will ensure that

backlogs do not occur in the future.

- D. A plan for unmarked objects should be included in the plan for the documentation backlog.

## Loan Agreement and Records

**4.10 ■ Please submit the loan-in agreement procedure defined in the Documentation Procedural Manual. Please submit a copy of the museum's loan agreement for in-coming loans.**

■ This is a Minimum Standard for Full Accreditation. Questions 4.11 and 4.12 also relate to this Minimum Standard. See also Question 1.7.

Please enclose the loan-in agreement procedure and the relevant additional documents along with your Application Form.

### ■ Requirements

- (i) Applicants must have written procedures for borrowing (loans in) defined in the Documentation Procedural Manual.
- (ii) All objects on loan must be recorded. Recording can be in the master database or loans register. Files for loans should be created to contain all relevant information, (e.g. relevant correspondence, loan agreements, receipts).
- (iii) Applicants must designate the authority for all loans.
- (iv) All loans must be for a fixed period. Long term loans may be renewed on a regular basis. This allows for regular checks on condition etc. and enables the museum to keep details of the lenders and borrowers up to date.
- (v) Loans must be formalised with a loan agreement between both parties. The purpose of a loan should be recorded on the loan agreement. Applicants must submit a generic loan agreement for different types of loans (e.g. loans to the museum's collection, temporary loans for exhibition).

### ■ Guidelines

- A. Applicants should give details on the procedures of recording different types of loans.
- B. The loans in procedure defined in the Documentation Procedural Manual should include:
  - (a) Assigning a loan number
  - (b) Purpose of loan (e.g. display, research).
  - (c) Loan authorisation responsibilities
  - (d) Statement of condition of loan
  - (e) Statement of standard of care provided
  - (f) Statement of information (e.g. facilities report)
  - (g) Negotiation of conditions of loan (including any special environmental, security, handling or display requirements)
  - (h) Loan maintenance requirements (e.g. loan checks, application for renewal of long-term loans)
- C. Each **loan in** should have a permanent record of information including:
  - (a) Loan agreement(s)
  - (b) Ownership
  - (c) Identification of the object
  - (d) Dates of the loan
  - (e) Valuation
  - (f) Insurance/indemnity details
  - (g) Authorisation

- (h) Cost and responsibilities
- (i) Reproduction and copyright
- (j) Specific requirements for scientific or research loans (e.g. where destructive analysis may be required)
- (k) Receipts (acceptance and return)
- (l) Location of loan
- (m) Condition report (beginning and end of loan)
- (n) Acknowledgements

**4.11 ■ Please submit the loan-out agreement procedure defined in the Documentation Procedural Manual. Please submit a copy of the museum's loan agreement for out-going loans.**

■ This is a Minimum Standard for Full Accreditation. Questions 4.10 and 4.12 also relate to this Minimum Standard. See also Question 1.7.

Please enclose the loan-out agreement procedure and relevant additional documents along with your Application Form.

#### ■ Requirements

- (i) Applicants must have written procedures for lending (loans out) objects defined in the Documentation Procedural Manual.
- (ii) All objects on loan must be recorded. Recording can be in the master database or loans register. Files for loans should be created to contain all relevant information, (e.g. relevant correspondence, loan agreements, receipts).
- (iii) Applicants must designate the authority for all loans.
- (iv) All loans must be for a fixed period. Long term loans may be renewed on a regular basis. This allows for regular checks on condition etc. and enables the museum to keep details of the lenders and borrowers up to date.
- (v) Loans must be formalised with a loan agreement between both parties. The purpose of a loan should be recorded on the loan agreement. Applicants must submit a generic loan agreement for different types of loans (e.g. loans to the museum's collection, temporary loans for exhibition).

#### ■ Guidelines

- A. Applicants should give details on the procedures of recording different types of loans.
- B. The **loans out** procedure defined in the Documentation Procedural Manual should include:
  - (a) Assigning a loan number
  - (b) Reason for loan request (display, research etc.)
  - (c) Loan authorisation responsibilities
  - (d) Statement of conditions of loan
  - (e) Statement of standards of care required
  - (f) Exchange of information e.g. facilities report
  - (g) Negotiation of costs, couriers, transport, packing etc
  - (h) Loan maintenance requirements (e.g. loan checks, application for renewal of long-term loans)
- C. Each **loan out** should have a permanent record of information including:
  - (a) Loan agreement(s)
  - (b) Borrower
  - (c) Identification of the object including Accession Number
  - (d) Dates of the loan
  - (e) Valuation

- (f) Insurance/indemnity details
- (g) Authorisation
- (h) Costs and responsibilities
- (i) Reproduction and copyright
- (j) Specific requirements for scientific or research loans (e.g. where destructive analysis may be required)
- (k) Receipts (acceptance and return)
- (l) Condition report (beginning and end of loan)

**4.12 ■ Please give details of the system and submit the procedures for recording loans defined in your Documentation Procedural Manual.**

■ This is a Minimum Standard for Full Accreditation. Questions 4.10 and 4.11 also relate to this Minimum Standard. See also Question 1.7.

#### ■ Requirement

- (i) A loans database and/or loans register must be established and maintained.
- (ii) The system for recording loans must be separate from the system for managing the collection.
- (iii) The procedures for recording loans should be defined in a Documentation Procedure Manual

## Catalogue

**4.13 ■ Please submit details on how the museum's catalogue is compiled and maintained, and details on the information recorded defined in the Documentation Procedural Manual. Please submit a fully completed sample record.**

■ This is a Minimum Standard for Full Accreditation.

Please enclose the relevant additional documents along with your Application Form.

#### ■ Requirements

The catalogue contains information relating to each object in the collection. It is a comprehensive record of all information on an object or group of objects.

- (i) Applicants must have a procedure for recording the primary information relating to each object or group of objects. Museums are not required to have this level of information for all objects, but should have a system in place which can be developed and added to.
- (ii) Applicants must define a minimum level of information required in each catalogue record (see Guidelines below). This ensures continuity and consistency in what information is recorded and how. This standard must be supported by a written procedure detailed in the Documentation Procedural Manual.

#### ■ Guidelines

- A. The minimum catalogue record should include:
  - (a) Accession number
  - (b) All previous numbers
  - (c) Object name
  - (d) Title (where appropriate)
  - (e) Number of items
  - (f) Brief description
  - (g) Attribution
  - (h) Source/place information

- (i) Provenance
  - (j) Acquisition method
  - (k) Acquisition source information (e.g. donor etc.)
  - (l) Acquisition date
  - (m) Price (if applicable)
  - (n) Location
- B. The catalogue record may include:
  - (a) A cross-reference to primary documentation using the accession number, entry record and any previous numbers
  - (b) A basic description to allow identification of the object or group of objects.
  - (c) An historical archive for the object
  - (d) Access to collections management information concerning the object (e.g. loans, condition, conservation, valuation)
  - (e) References to secondary information sources (bibliographic references).
- C. Catalogues may be manual or computerised (e.g. catalogue cards, history files, computer records etc).
- D. Useful indexes to aid access to catalogue information include:
  - (a) Object name
  - (b) Artist/maker/manufacture
  - (c) Subject
  - (d) Source of acquisition
  - (e) Place information

## Computerised Records

- 4.14 ■ Are the museum's records computerised? Please give details of the database or software used.
- 4.15 ■ Is the museum's computerised data protected from accidental loss or damage? Please give details of the data back-up system, including frequency and storage.

## Data Retrieval

- 4.16 ■ Please describe the museum's procedure for retrieving the computerised data on an object.

## Data Access

- 4.17 ■ Please describe the regulations for access to the museum's computerised data.

## PUBLIC SERVICES ■ ■ ■ ■

### 5. EXHIBITION ■ ■ ■ ■

Exhibition includes both long-term displays from the museum's collection and temporary exhibitions.

See also Factsheet 7: **Exhibition Standard** (relates to Questions 5.1, 5.3 and 5.4) and Factsheet 8: **Evaluation of Exhibitions** (relates to Question 5.3)

#### Effective Interpretation

**5.1 ■ Please demonstrate that the museum employs a consistent approach to labelling. Give details of the museum's house style(s). Are the size and position of labels accessible for the visually impaired?**

■ This is a Minimum Standard for Interim Accreditation.

##### ■ Requirements

- (i) Applicants must develop a consistent house style with a labelling system that works on two levels: interpretation and presentation.
- (ii) If labels are not used, alternative methods of interpretation are acceptable. Applicants must give details of any other methods used, (e.g. guidebooks, floor plans).

##### ■ Guidelines

- A. The museum should develop a basic labelling system that serves as its house style.
- B. Interpretation
  - (a) Labels should be accurate.
  - (b) Labels should be legible. A minimum font size of 14 point is recommended.
  - (c) Museums have a clear and consistent policy on whether or not the Irish language is used.
- C. Presentation
  - (a) The type should be large enough to read without difficulty.
  - (b) Text in all capitals should be used sparingly.
  - (c) Headlines should be in larger type. In ID labels, the names of objects are presented in bold.
  - (d) Labels should be placed close to the objects they relate to.
  - (e) Labels should be well-lit.
- D. See also Factsheet 7: **Exhibition Standard**.

**5.2 ■ Please outline the museum's budget for exhibitions, giving details of the annual amount in the current and previous year.**

■ This is a Minimum Standard for Interim Accreditation. Question 2.6 also relates to this Minimum Standard.

##### ■ Requirements

- (i) Applicants must include a budget for exhibitions in their annual museum budget. For voluntary museums, benefit-in-kind is acceptable in lieu of an exhibition budget.

**■ Guidelines**

- A. The budget for exhibitions will depend on the overall resources available to individual museums. The amount allocated may be small for museums with limited resources.
- B. The budget for exhibitions should indicate the sums available for long-term exhibitions or temporary exhibitions.
- C. See also Factsheet 2: **Financial Standards**

**5.3 ■ Describe the methods used by the museum to evaluate exhibitions. Please submit a copy of a recent visitor survey, giving details of numbers surveyed, survey frequency, and when the most recent survey was carried out. Describe how the results are analysed and what action is taken in response to survey results?**

**■ This is a Minimum Standard for Full Accreditation.**

**Please enclose the relevant additional documents along with your Application Form.**

**■ Requirements**

- (i) Applicants must have methods (e.g. surveys) to record visitors' responses to the exhibitions and the museum in general.
- (ii) Applicants must conduct regular analysis of visitors' responses to the exhibitions and any surveys conducted.

**■ Guidelines**

- A. A visitor survey may be used for both temporary and long-term exhibitions.
- B. A survey of the exhibitions should be conducted at least once in the five year accreditation cycle.
- C. Surveys should collect data on what worked best in the exhibition, what did not work, what was learnt from the exhibition and suggestions for improvement.
- D. The results of the survey should be assessed and used to influence decisions made about the future development of exhibitions.
- E. See also Factsheet 7: **Exhibition Standard** and Factsheet 8: **Evaluation of Exhibitions**.

**5.4 ■ Please submit a copy of the museum's Exhibition Policy. Please list any temporary exhibitions held in the last three years.**

**■ This is a Minimum Standard for Full Accreditation.**

**Please enclose formally approved documents along with your Application Form.**

**■ Requirements**

- (i) Applicants must submit a copy of the museum's Exhibition Policy.
- (ii) Applicants must submit evidence that the Exhibition Policy has been formally approved by the governing body. A signed and dated minute from the governing body will fulfil this requirement.

**■ Guidelines**

- A. The Exhibition Policy should outline the museum's position on long-term and temporary exhibitions.



For example, is there a planned programme for changing exhibitions (long-term and temporary) and their contents?

B. The Exhibition Policy should include an emphasis on active exhibition management (e.g. rotation of objects from the museum's collection).

C. See also Factsheet 7: **Exhibition Standard**.

5.5 ■ Does the museum involve community, educational or other groups in the planning of exhibitions? Please give details.

5.6 ■ Does the museum have a policy regarding the use of the main European languages? Please give details.

5.7 ■ Please give details of any temporary exhibition space in the museum.

5.8 ■ Who is responsible for the co-ordinating temporary exhibitions?

5.9 ■ Please provide details of in-house experience and in mounting exhibitions. Please provide details of any training in exhibition management received in the last five years.

## 6. EDUCATION ■ ■ ■ ■

See also Factsheet 9: **Developing an Education Policy** (relates to Question 6.6)

### Education Activities

6.1 ■ Describe the educational activities or public events (collection-based and/or other) that the museum provides. Please describe briefly the different types of activity, their frequency, and the target audience(s) for each type of activity (see guidelines). Include a sample of a recent printed programme of events or a listing of education activities/public events over the previous 2-year period.

■ This is a Minimum Standard for Interim Accreditation.

Please enclose the relevant additional documents along with your Application Form.

#### ■ Requirements

- (i) Applicants must provide details of the education activities/programmes provided by the museum.
- (ii) Applicants must indicate how frequently the activities take place.
- (iii) Applicants must submit any pre-printed programmes of events and/or a list of education activities over the previous two year period (smaller museums may wish to extend this to five years).

#### ■ Guidelines

A. Education activities refer to a wide range of events and/or programmes that take place in museums. It is recognised within the accreditation scheme that the scope and frequency of such activities are determined by the nature and size of the museum, and the staff and resources available. Education activities include, in particular, focused projects aimed at specific target groups, e.g. school-children, adults, teenagers, older people.

B. The following list represents the different types of **educational activities/events** that take place in

museums. Please select from this list where appropriate and include any additional activities that are not listed.

Guided tours (on-site)	Music events
Guided tours (off-site)	Literary events
Seminars	Interactive
Lectures/talks	Performance art
Practical workshops	Slide shows
Handling sessions	Artist in residence
Outreach activities	Meetings
Holiday activities	Openings
Touring exhibitions	Multicultural events
Temporary exhibitions	Events linked to festivals
Activity worksheets	Portfolio or drawing classes
Publications	Open/family days
Teacher training	
Study days	

- C. The following list is a representative sample of the type of **target audiences** that may be relevant to the provision of the education service in your museum.

Pre school children	Adults
Organised groups	Artists/specialists
Families	Young people
Tourists	People with disabilities
School groups	Volunteers
Community groups	Teachers
Senior citizens	Ethnic minorities
Third level students	

- D. Please indicate as accurately as possible the **frequency** of different types of activity. Use phrases such as 'daily', 'once a week', 'once a month', 'occasionally', 'once-off' rather than 'year round'.

6.2 ■ Is the museum developing any programmes to engage with new audiences? Please outline briefly.

6.3 ■ Please give details of the people (staff member, team, volunteers, and external facilitators) responsible for education and planning an annual education programme. Also list those involved in the delivery of the programme.

6.4 ■ Does the museum have a dedicated budget for the education service? If yes, please give details of the annual amount in the current and previous year. If no, please outline how funding is sourced for education activities/programmes.

6.5 ■ Does the museum have dedicated documentation to support education programmes (e.g. worksheets)? If yes, please submit a sample page/s from the different documents.

## Education Policy

6.6 ■ Please submit copies of the museum's Education Policy and Annual Education Action Plan.

■ **This is a Minimum Standard for Full Accreditation.**

Please enclose formally approved documents along with your Application Form.

■ **Requirements**

- (i) Applicants must submit a copy of the museum's Education Policy.
- (ii) Applicants must submit evidence that the Education Policy has been formally approved by the governing body. A signed and dated minute from the governing body will fulfil this requirement.

■ **Guidelines**

- A. The Education Policy should contain the following information:
  - (a) Introduction and context - brief history of education provision in museum
  - (b) Education mission statement
  - (c) Aims and objectives
  - (d) Identification of target audiences
  - (e) Type of provision
  - (f) One-year action plan including details on staffing and resources
  - (g) Performance indicators
  - (h) Periodic review of the education policy
- B. See Factsheet 9: **Developing an Educational Policy**.

## 7. VISITOR CARE AND ACCESS ■■■■

### Opening Hours and Admission

See also Factsheet 10: **Visitor Statistics Survey Form** (relates to Question 7.7 and 7.8)

7.1 ■ **What are the opening hours of the museum on a year-round basis?**

7.2 ■ **Does the museum have an admission charge? If yes, please submit a sample of the receipting system and details of the admission rates.**

■ **This is a Minimum Standard for Interim Accreditation.**

Please enclose the relevant additional documents along with your Application Form.

■ **Requirements**

- (i) Applicants must have a receipting system if there is an admission charge payable.
- (ii) Applicants must submit a sample of the receipting system.

■ **Guidelines**

- A. Admission charges should be clearly displayed.
- B. Receipts or tickets may be designed to act as a souvenir of the visit.
- C. Front-of-house staff should deal courteously with visitors when issuing their tickets.
- D. If there are large numbers of visitors, a queuing system should be in operation and visitors should be informed of when they will be able to proceed.

### 7.3 ■ Please describe the museum's external signage. Are the opening hours and any charges clearly displayed?

■ This is a Minimum Standard for Interim Accreditation.

You may enclose a photograph(s) of your signage showing the information required

#### ■ Requirements

- (i) Applicants must have clear external signs with opening hours displayed.

#### ■ Guidelines

- A. Opening hours should be strictly adhered to.
- B. Staff should be in earlier than the opening time and ensure everything is in order prior to opening.
- C. The museum should remain open until closing time even if there are no visitors.

## Visitor Facilities and Services

### 7.4 ■ Please indicate the visitor facilities provided by the museum.

■ The provision of toilets and a telephone with answering service are Minimum Standards for Interim Accreditation.

Telephone with answering service	<input type="checkbox"/>
Toilets	<input type="checkbox"/>
Toilets for the disabled	<input type="checkbox"/>
Baby changing	<input type="checkbox"/>
Lift	<input type="checkbox"/>
Cafe	<input type="checkbox"/>
Shop	<input type="checkbox"/>
Cloakroom	<input type="checkbox"/>
Parking	<input type="checkbox"/>

#### ■ Requirements

- (i) Applicants must have a telephone system with an answering service.
- (ii) Applicants must have a toilet on the museum premises.

#### ■ Guidelines

##### A. Telephone

- (a) All messages and queries should be replied to as soon as possible.
- (b) When taking group bookings, a system should be in place to allocate a time to visit and ensure that visitors have enough time to visit.
- (c) All bookings should be confirmed in writing.

##### B. Toilets

- (a) All toilets should be maintained to the highest standards.
- (b) Baby changing areas should be clean and properly equipped.

## 7.5 ■ Please indicate the visitor services provided by the museum.

Permanent displays	<input type="checkbox"/>
Temporary exhibitions	<input type="checkbox"/>
Reading/research facilities	<input type="checkbox"/>
Guided tours	<input type="checkbox"/>
Multi-lingual guided tours	<input type="checkbox"/>
Audio guides	<input type="checkbox"/>
Multi-lingual audio-guides	<input type="checkbox"/>
Audio-visual presentations	<input type="checkbox"/>
Interactives	<input type="checkbox"/>
Brochure	<input type="checkbox"/>
Multi-lingual brochure	<input type="checkbox"/>
Guidebook	<input type="checkbox"/>
Website	<input type="checkbox"/>
Children's Activity Area	<input type="checkbox"/>
Studio/Workshop Space	<input type="checkbox"/>

## Visitor Numbers and Statistics

### 7.6 ■ Does the museum provide a Visitor's Book or Comment Form? Please give details.

### 7.7 ■ Please give details of how visitor numbers and details are recorded. What is the annual number of visitors to the museum in each of the last three years? Please submit an analysis of the previous year's visitor numbers.

■ This is a Minimum Standard for Interim Accreditation. Question 7.8 also relates to this Minimum Standard.

Please enclose the relevant additional documents along with your Application Form.

#### ■ Requirements

- (i) Applicants must have a system to record the number of visitors to the museum. Visitor numbers and other basic data must be collected regularly.

#### ■ Guidelines

- A. See also Factsheet 10: Visitor Statistics Survey Form. Museums may use this Factsheet as a template for a visitor statistics survey.
- B. Some museums may have ticketing systems that will give certain information on their visitors.

### 7.8 ■ Please submit a copy of a visitor statistics survey. Give details of survey frequency, including when the most recent survey was carried out.

■ This is a Minimum Standard for Interim Accreditation. Question 7.7 also relates to this Minimum Standard.

Please enclose the relevant additional documents along with your Application Form.

#### ■ Requirements

- (i) Applicants must have a system in place for surveying and analysing quantitative information about their visitors.
- (ii) Results of the visitor survey must be analysed monthly and annually and the most recent analysis submitted.

## ■ Guidelines

- A. A Visitor Survey is designed to capture the following information about the visitors:
  - (a) Date of visit
  - (b) Number of visitors
  - (c) Length of visit – time of arrival and time of departure.
  - (d) Nationality
  - (e) How they heard about the museum
- B. Visitor Survey may be carried out by the museum or in the case of larger institutions, may be conducted by external companies. Museums may use the template Visitor Survey Form or if they have their own, all the information above must be included.
- C. See Factsheet 10: **Visitor Statistics Survey Form**.

**7.9 ■ Does the museum have a marketing budget? If yes, please give details of the annual amount in the current and previous year.**

## Access

**7.10 ■ Please describe how the museum advertises opening hours, collections, exhibitions and events. Please submit a sample of the museum's publicity material.**

**7.11 ■ Does the museum provide greater access to the collection(s) for special interest groups/ individuals?**

**7.12 ■ What kind of access does the museum provide for people with disabilities? Please describe any plans to provide or improve disabled access. Give a timescale for the plans.**

**7.13 ■ Please indicate which of the following facilities/services are provided for people with disabilities.**

Access guide	<input type="checkbox"/>
Parking bays for disabled	<input type="checkbox"/>
Ramped entrances	<input type="checkbox"/>
Wheelchairs	<input type="checkbox"/>
Wheelchair lift	<input type="checkbox"/>
Sign language guided tours	<input type="checkbox"/>
Loop system	<input type="checkbox"/>
Low-level phones	<input type="checkbox"/>
Signage in Braille	<input type="checkbox"/>
Tactile sets	<input type="checkbox"/>
Enlarged text	<input type="checkbox"/>

**7.14 ■ Please describe any public meeting space(s) in the museum.**

## FACTSHEET 1: DEVELOPING A STRATEGIC MANAGEMENT PLAN

THIS FACTSHEET RELATES TO QUESTION 2.3 OF THE MSPI  
(MUSEUM STANDARDS PROGRAMME FOR IRELAND)

### 1. Introduction

Writing a Strategic Management Plan can provide a museum with an opportunity to take stock of its position and reflect on its fundamental aspirations and purpose. Approached positively, it can be a rewarding and energising experience for all staff.

A Strategic Management Plan (SMP) is one of the minimum standards required as part of an application for the Heritage Council's Accreditation Scheme. It is a medium to long-term plan, usually covering a three to five year period. A SMP will focus on the museum as whole and not on individual sections within the museum. It will also consider external factors that may influence proposals. It is broadly composed of Strategic Aims and Objectives, with associated timeframes and resource implications. It is an overarching document that sets down aspirations, priorities, and cost implications.

In general, Strategic Management Plans record past achievements and provide a clear statement of purpose. They are primarily planning documents, but can also be used as advocacy documents in which a museum makes a case for the expansion of existing programmes.

### 2. Process

Strategic Management Plans are best developed through an internal process of discussion and review involving management, staff, and governors. Museums must also consult externally with stakeholders such as funding bodies, key individuals and organisations and, if at all possible, with the broader community.

Internally, conduct a SWOT (Strengths, Weaknesses, Opportunities, and Threats) Analysis. This can help define the current position and open up opportunities for discussion. The time required for this process will vary depending on the size of the museum. In a small museum it can be completed within two to three months. Larger museums with different departments will require longer.

### 3. Components of a Strategic Management Plan

A Strategic Management Plan normally consists of an introduction followed by a series of tables. Although presentation and terminology will differ, generally a SMP includes the following:

- i. Mission Statement
- ii. Overview
- iii. Situation Review
- iv. Financial Projections
- v. Strategic Aims or Goals
- vi. Objectives
- vii. Performance Indicators
- viii. Review Mechanism

#### i) Mission Statement

All Strategic Management Plans take the **Mission Statement** of the museum as their starting point. This

contains a clear statement of purpose for the museum and must be developed internally through discussion, led by the head of the museum. It must also relate to any overarching Mission Statement of a parent body.

A Mission Statement must state the purpose, values, goals, functions, and stakeholders of the museum. Specific Strategic Aims and Objectives flow from this initial statement.

In support of the Mission Statement, it is recommended that museums develop a **Statement of Values**: matters that are important to it and which drive its work. These will include values like: preserving a cultural inheritance; passing knowledge on to new generations; encouraging cultural diversity; inculcating civic pride; and contributing to the community or economic development. The values of each museum will reflect its particular origins and will vary accordingly.

## ii) Overview

The **Overview** is best presented in narrative form. It states the context in which the SMP will be implemented over the planning period. A two or three page narrative (depending on the size of the museum) must include the following information:

- A general description of the museum
- A note on the services that are provided to users
- A short pen-picture of the museum buildings
- The size and range of collections held
- The numbers and functions of staff
- The form of governance within which the museum functions
- The normal sources of operational funding
- Summary of income and expenditure figures
- A note of any current capital works
- A description of stakeholders
- The annual visitor numbers

It is also recommended that an annual **Income and Expenditure Summary Statement**, with further detail on levels of spending and income, is included as an Appendix.

## iii) Situation Review

The **Situation Review** takes a critical look at the museum's current position as part of the development of the Strategic Management Plan. All museums, whether or not currently operating within a SMP, must review their achievements to date and identify obstacles to achievement. They must also review progress against Strategic Aims, however informally stated.

The Situation Review can also be used to examine the changing external environment and the influence it has had up to this point, sometimes referred to as an 'Environmental Scan'. A SMP that also functions as an advocacy document should use the Situation Review to define key issues that will affect the future of the museum. These can then be addressed through the Strategic Aims and Objectives.

The museum's Situation Review should take account of estimated income and expenditure during the lifetime of the Strategic Plan and should include financial projections as an Appendix. See also Standard 2.6 and Factsheet 2: Financial

## iv) Strategic Aims

Strategic Aims should be defined as clearly as possible. It is best to concentrate on a small number of realistic and achievable aims. These may relate to key programmes and activities, including core functions such as



collections care. For a small museum six aims may be appropriate, but the number will vary between museums.

A Strategic Management Plan is not a short-term document. It is designed to focus on key issues and policies that will concern the museum over a medium to long-term period. Strategic Aims (or goals) are not usually achievable within a one-year planning period but should generally be achievable within the overall timeframe of the SMP.

Strategic Aims can be stated in narrative and list form. It is recommended that each Strategic Aim is stated at the head of a table that tabulates all the associated Objectives. Table 1 shows how each Aim can be presented with all the associated Objectives. The timescale for each Objective is indicated in columns.

Include a general statement about resources within the introductory narrative to the Strategic Aims and Objectives. These statements will reflect the individual position of the museum. For example:

*'This Strategic Management Plan is for five-year period. It is based on certain assumptions and cannot be achieved without additional funding. The achievement of the performance targets also depends on such resources. The SMP also assumes continued annual funding from Whichever Council.'*

*'Many of the activities listed below can and will happen using the personnel and finance currently available to the museum. However, the SMP also covers problems and opportunities that cannot be addressed or realised without the investment of extra resources.'*

#### iv) Objectives

**Objectives** are short-term proposals that flow from each Strategic Aim. Objectives should usually be achievable within one year of business although some may take a number of years to achieve, depending on individual circumstances. All Objectives must be as specific as possible. In compiling a list, concentrate on what the museum needs to achieve and can realistically achieve on a year-by-year basis.

The linked relationship between Strategic Aims and Objectives is best summarised with a hypothetical example:

**Strategic Aim 1:** To increase visitor numbers to the Museum by 5%. In support of this aim the museum sets a number of objectives.

**Objective 1:** To publish new promotional literature (this could be a one-year objective)

**Objective 2:** To target the schools' market with special learning resources (this could be repeated for a number of years in order to break up the delivery of the objective into manageable time periods).

Each Objective should give the timeframe for delivery. If an Objective requires additional resources to achieve it, these must also be shown (see Table 2).

If an Objective can be achieved within your current budget, there is no need to show a figure in the resource column. Where additional funds are needed, for example to fund a new education outreach programme, you must research this cost and show that figure against that particular Objective.

#### v) Performance Indicators

A Strategic Management Plan should measure the museum's corporate performance. It does not measure individual performance. **Performance indicators** should be few and realistic. For example, an SMP that

uses six Strategic Aims should establish at least one indicator for each aim. Some museums use up to ten indicators, some annual, and some to recur throughout the SMP period.

Performance indicators or measures may be qualitative or quantitative:

- Qualitative indicators could include the improvement of displays or an enhanced conservation provision
- Quantitative indicators could include visitor and user numbers, percentage reductions in documentation backlogs, or the realisation on time of a major objective

#### vi) Review Mechanism

In order to monitor progress and identify problems during the Plan period, it is recommended that the Strategic Management Plan, as a whole, be reviewed on an annual or semi-annual basis. The following statement may act as a guide:

*'This is a xx-year Strategic Management Plan which will be reviewed annually. During the year, key objectives that require interim review will be the subject of a six-month review. All reviews will take the form of meetings between the curator and the museum management. Progress and problems will be discussed against each objective, using the SMP as a guide.'*

*'Within the time span of the SMP, the museum will be working to Annual Action Plans that will break down the objectives for the year into a series of tasks and date targets and other significant factors. This Annual Action Plan contains its own internal review mechanisms.'*

## 4. Appendices

It is recommended that certain useful information be attached as appendices to a Strategic Management Plan. These should be few in number. The following should be considered:

- Annual Income and Expenditure Summary Statement
- Collection and Loan Policies
- Description of consultation process for the SMP (if any)
- A brief contextual note about Museum Accreditation
- List of governors, boards, committees and staff and
- Contact information
- Significant documents, such as a Development Plan

## 5. Writing Annual Action Plans

In addition to a Strategic Management Plan applicants for Museum Accreditation will be required to submit an **Annual Action Plan** with three to five-year SMPs.

An Annual Action Plan is a separate document which takes the objectives for one year of the SMP and defines associated tasks and budgets for each Objective. Museums will be required to write an Annual Action Plan for each year of the SMP, covering the objectives to be addressed during that year, but for accreditation application purposes a plan for the first year will suffice.

The annual production of an Annual Action Plan can be set down within the SMP as an Objective, recurring each year. This would normally be included in a Strategic Aim concerning management.

An Annual Action Plan is usually written as a table. Information should be presented under a series of column headings, using short phrases, not sentences. Within the tabulated framework, personnel and

financial resources should be assigned against the different objectives. Generally speaking, the column headings shown below should be used.

Tasks/ actions	Person responsible	Targets	Other key players	Critical success factors	Resources	Review of Objective
Tasks or actions required to achieve the objective	The curator, conservator, etc, responsible for leading or meeting the objective	Usually date target. This column also allows you to identify the tasks to be completed in any one year	Individuals in other departments or in other organisations whose involvement is needed	Matters which will make or break the delivery of the objective, like the launch of a government policy	Funds needed to complete the task or meet objective (extra to usual budget)	The frequency and method of review

### SAMPLE TABLES: Table 1

Strategic Aim 1: To develop, manage and care for the collections of Whichever Museum

Objectives	2004	2005	2006	2007	2008	Resource
1. Continue to develop the collections through appropriate acquisition	■	■	■	■	■	
2. Assess the extent of the backlog in documentation	■					
3. Prepare a plan to address the backlog in collections documentation	■					
4. Review the performance of the computer documentation system	■					
5. Implement the Documentation Backlog Plan	■	■	■	■	■	
6. Develop a manual for documentation procedure	■					
7. Write a Collections Loan Policy	■					
8. Write a Disposal Policy	■					
9. Assess the feasibility of digitising the photographic and archive collections		■				
10. Prepare a Collections Care Strategy	■					
11. Develop a comprehensive museum Disaster Plan		■				

**SAMPLE TABLES: Table 2****Strategic Aim 1: To develop, manage and care for the collections of Whichever Museum****Objective 1:** To continue to develop the collections through appropriate acquisition based on the Collection Policy

Task	Responsibility (internal)	Target	Other key players	Critical Success Factors	Resource	Review
1.						
2.						
3.						

**Objective 2:** To assess the extent of the backlog in documentation and prepare a plan to address backlog

Task	Responsibility (internal)	Target	Other key players	Critical Success Factors	Resource	Review
1.						
2.						
3.						

## FACTSHEET 2: FINANCE

### THIS FACTSHEET RELATES TO QUESTION 2.6 AND 2.7 OF THE MSPI (MUSEUM STANDARDS PROGRAMME FOR IRELAND)

1. Two Standards relate to the financial affairs of an applicant museum:
  - Standard 2.6, which calls for a financial plan, procedures or estimates
  - Standard 2.7, requiring to the provision of accounts
2. The purpose of these Standards is to provide evidence that the financial and other resources available to the applicant museum:
  - Are consistent with MSPI's eligibility criteria in demonstrating that:
    - no individual or organisation profits from the museum's operation, and that its resources are used to advance the museum's purpose;
    - the museum's collections are held in trust, and not used as collateral for any loan or to profit another party
  - Provide a level of financial stability adequate for the achievement of the Standards overall
  - Are sufficient to achieve the current and proposed levels of activity described in the application

#### **Standard 2.6: Please submit a copy of the museum's Financial Plan and/or details of financial procedures and proposed estimates.**

3. Applicants must demonstrate that they have systems and processes in place that represent a workable approach to financial planning. For the purposes of MSPI, a financial plan consists of a statement of the resources a museum expects to receive, and how they will be expended.
4. This financial planning requirement applies equally to organisations both large and small, and to when the museum is part of a larger organisation as well as when it is a freestanding entity. It is recognised that the financial plan/procedures/estimates of a museum within a conglomerate body may well be integrated into a corporate financial plan or budget book. In this situation:
  - The application only need to include extracts from such larger documents that specifically relate to the museum, but these should provide a comprehensive financial overview of the museum's operations
  - Where museum information is consolidated within other budget headings, these must be disaggregated to the extent necessary to identify the funding being deployed to achieve the Standards
  - When financial plans/budgets include material that is commercially sensitive, the Heritage Council will ensure that documents marked as such will be so treated
5. The financial plan must be consistent with other plans and policies presented with the application, particularly:
  - Standard 2.3 - Strategic Management Plan and Annual Action Plan
  - Standard 3.20 - Care of Collections Strategy
  - Standard 4.9 - Documentation Backlog (where relevant)
  - Standard 5.2 - Exhibitions Budget
  - Standard 6.1 - Outline of Education Activities/Programmes
  - Standard 6.6 - Education Policy, with its component 1-Year Action Plan.

6. Ideally, all this information will be brought together within a single business plan that incorporates the Annual Action Plan required to meet Standard 2.3. Where this is not possible, the applicant must provide an annual budget for the current year and estimates for the year that follows. Whichever is used, they should include:
- Estimates of both income and expenditure for the current financial year, and projections for the financial year that follows, compared with the actual figures for the most recently completed financial year
  - Budget lines that identify the expenditure necessary to achieve the Standards (e.g. in collections care, education and learning, marketing, visitor services) as well as provision to meet specific requirements (e.g. Standard 5.2 - Exhibitions Budget)
  - For those museums that rely on volunteer support (whether or not they employ paid staff) an estimate of the total number of volunteers and the hours worked by these volunteers should be reported
7. The following template matches the basic requirement of this Standard. It is for indicative purposes only, and will need to be amended to reflect individual circumstances, whether by adding or subtracting budget lines. Those lines that are italicised reflect the expenditure that specifically relates to the Standards, where year-on-year provision might be expected to continue.

### SAMPLE MUSEUM: Financial Plan

201A [Last Year] Actual		201B [Current Year]* Budget	201C [Next Year]* Estimate
	<b>Income</b>		
	Admission Fees		
	Sales		
	Grants		
	Donations		
	Rents		
	Other Income		
	Etc		
	<b>TOTAL INCOME</b>		
	<b>Expenditure</b>		
	Staff costs & training		
	Premises		
	Collections care/ Documentation		
	Exhibitions		
	Learning & education		
	Visitor Care & Access		
	Office & administrative costs		
	Audit and accountancy		
	etc		
	<b>TOTAL EXPENDITURE</b>		
	<b>NET INCOME/(EXPENDITURE)</b>		
	Number of volunteers		
	Number of volunteer hours worked		

8. Applicants are encouraged to use the same format, with additional columns to accommodate projections for later financial years, to provide financial foresight as an element within the Strategic Management Plan (Standard 2.3).
9. It is understood that MSPI application deadlines and assessment dates may not always correspond to an applicant's financial planning cycle and, in particular, approved estimates for the coming year may not always have been completed. If this is the case, submission of a complete financial plan/budget for the preceding year, in addition to the current year's budget, will demonstrate that the Standard has been met.
10. Applicants must submit evidence showing formal approval of the Financial Plan or Estimates, as follows:
  - Where the museum is an independent entity, this should be in the form of a certified, signed and dated copy of a minute of the governing body, that approves the Financial Plan/Estimates, whether as a separate document or as part of the museum's Strategic or Annual Action Plan, or
  - Where the museum is part of a conglomerate organisation such as national or local government, a university, or a learned society, certified, signed and dated on behalf of the organisation's governing body by an official authorised so to do

**Standard 2.7: Please submit a copy of the Audited Accounts or Certified Statement of Accounts from the most recent 2-year period.**

11. The Standard requires that applicants submit a copy of an audited or certified statement of accounts for the most recent two-year period.

## Audited Accounts

12. Audited accounts are required when the museum is an entity in its own right. In terms of MSPI 'audit' means formal external scrutiny or examination of accounts, whether by a registered auditor or other appropriately-qualified/experienced person otherwise unconnected with the museum. That person must certify those accounts in appropriate terms and state the terms of that certification.
13. Audited accounts must be in form required by law. In the case of a charities registered with the Revenue Commissioners, these are the annual accounts currently delivered to the Commissioners, whether by requirement or on request. Museums that are registered as companies should follow the requirements of the Companies Acts.
14. Currently, there is no specific format for the reports and accounts of Irish charities. However, on implementation of the relevant parts of the Charities Act 2009, the form and content of charity accounting and reporting will be prescribed in Regulations made by the Minister. It is widely anticipated that the Statement of Recommended Practice: Accounting and Reporting by Charities (SORP), or something very similar, will be adopted, as this follows UK-Ireland Generally Accepted Accounting Practice (GAAP). Anticipating this, the SORP is already in use in Ireland as best practice guidance. The early adoption of the SORP (a new version of which will apply to financial years ending after 1 January 2015), applied proportionately to individual circumstances, is encouraged.
15. Irrespective of whether or not the SORP is followed, accounts that meet the Standard must include:
  - An account of income and expenditure in sufficient detail to demonstrate the museum's

- activities during the financial year being reported;
- A statement of balances held by the museum on the last day of that financial year; and
- Disclosure, when necessary, either on the face of the accounts or as notes thereto, of any funds that are permanent or expendable endowment, or where their use is restricted to the specific purpose for which they were given.

## Certified Accounts

16. These are required where the museum is not a legal entity in its own right, and is

- Operated alongside other activities by a conglomerate organisation such as national or local government, a university, or a learned society; **and**
- Its income are not reported individually either in the accounts of that parent body or any subsidiary entity, or published separately in any form.

17. Certified accounts must be in a form that identifies:

- A statement of income and expenditure in sufficient detail to demonstrate the museum's activities during the financial year that is being reported; and
- Any notes necessary to clarify the accounts.

18. The following is an appropriate format for certified accounts:

### Sample income & expenditure account for the year ended 201B

	201B [Current Year]*	201A [Last Year]
<b>Income</b>		
Admission Fees		
Sales		
Grants		
Donations		
Rents		
Other Income		
<b>TOTAL INCOME</b>		
<b>Expenditure</b>		
Staff costs & training		
Premises		
Collections care/Documentation*		
Exhibitions*		
Education*		
Visitor Care & Access*		
Office & administrative costs		
Audit and accountancy		
Sundries		
<b>TOTAL EXPENDITURE</b>		
<b>NET INCOME/(EXPENDITURE)</b>		



## 19. The Notes to the accounts should disclose:

- Where the museum has an endowment, the nature and size of that endowment, and transactions relating to it
- The extent of any funds received that are restricted to the specific purpose for which they were given using the following format

Fund name and purpose	Balance b/f	Income in Year	Expenditure in Year	Transfers in Year	Balance c/f

## 20. These accounts must be signed by a person authorised by the parent organisation to certify the accounts. 'Certification' means that the signatory believes to the best of their knowledge that the accounts are correct. The certification block should read as follows:

'I certify that, to the best of my knowledge and belief, the above accounts present a correct picture of the [name of museum] for the financial year ended [date of last day of financial year to which the accounts refer]'

Signed [Name]

Designation [Status/Job Title within parent organisation]

Date [of signature]'

### General Requirements

## 21. The following requirements are to be met irrespective of whether accounts are certified or audited:

- They must be signed by a person authorised by the museum's governing body, and their name and office and date of signature given
- To enable comparisons to be made, figures in the accounts for the year being reported must include a corresponding amount for the previous financial year
- Copies of the most recent set of accounts together with those for the preceding financial year should be provided - two sets of accounts are required, not just one year's accounts that include comparative figures for the preceding year.

## FACTSHEET 3: CONDITION ASSESSMENT

THIS FACTSHEET RELATES TO QUESTION 3.18 OF THE MSPI  
(MUSEUM STANDARDS PROGRAMME FOR IRELAND)

### Guidelines for the Condition Assessment of Objects within a Collection

This Factsheet is related to Guideline 3.18 of the Museum Standards Programme for Ireland (MSPI).

A basic knowledge of the condition of the collection is required to:

- i) Identify the most important pieces in the collection and take adequate steps to protect them.
- ii) Recognise material that is actively deteriorating and ensure steps are taken to prevent contamination with other material. This entails being able to distinguish between the different types of materials and knowing what materials are most environmentally sensitive.
- iii) Prioritise the preservation of the collection through preventive conservation measures, e.g. using correct archival storage materials, etc.
- iv) Identify areas that require access to preservation/conservation advice, if unavailable in-house this includes either training staff members and/or appointing outside consultants.
- v) Record the condition of an object to ensure it can be safely displayed, handled, consulted, or loaned. For example:
  - Are textiles fading and/or fraying?
  - Are prints and drawings 'foxing', i.e., developing brown spots?
  - Is there mould growth?
  - Is there wood-worm or other signs of infestation?
  - Is paint flaking from oil paintings or manuscripts?
  - Are metal objects corroding?
  - Are documents, photographs or works of art on paper becoming brittle and faded or discoloured?
- vi) Record the condition of a collection. This can be recorded in written form and/or visually with a camera or video and voice-over.

The condition of an object is not easily defined, but may be considered an evaluation of the ability of the object to function within the collection. In this context, function means the ability to display/exhibit, consult, and loan. This in turn may be measured against the importance of the object to the collection, its value, and uniqueness.

The condition of an object can be rated as follows:

**Good condition:** that the object is structurally sound, that the materials from which it is made are not actively deteriorating; that the object can go on display, loan, and be handled with due consideration.

**Fair condition:** that the object may be damaged, has previous repairs which may be injurious to it;

that the object is dirty but handled carefully, and with remedial care may be made available for display and consultation.

**Poor condition:** that the physical and/or chemical integrity of the object is seriously compromised; that the object may be actively deteriorating. Its very condition may render the object susceptible to further damage. The object cannot be displayed or made available for consultation.

There are two standard ways of assessing the condition, either using a condition survey or a condition report.

### **What is a condition report?**

A condition report is generated per object and details the type and extent of any damage. It also assesses the causes of the damage and will estimate whether or not the object is at risk from accelerated deterioration. A condition report may, but does not necessarily make recommendations for conservation treatment and will signal how soon some intervention may be required. They may therefore require input from a conservator; however this is often not possible.

### **What is a survey?**

A survey is an assessment of the condition of objects within a collection and is usually carried out to establish the overall condition status of the collection or a part thereof. It is usually not as labour intensive as condition reporting, as a number of items are examined at once, but that will depend on how accessible they are.

A condition survey can:

- Quantify amount of objects that are damaged
- Highlight type of damage
- Help prioritise preservation/conservation measures and treatments
- Can be carried out object by object or sample group - e.g. every 5 items examined on a shelf and used to estimate percentages
- Can be on-going as time allows or for a concentrated period of time
- Does not necessarily need to be carried out by a conservator, but staff need to have training in correct handling

There are a number of sample condition reports and surveys available to search online; the most useful type need to be tailored to fit the type of material you are assessing.

See Template Condition Report Form provided.

### **How to find a Conservator**

The Institute of Conservator-Restorer's in Ireland (ICRI) maintains a list of conservator-restorers working in Ireland and available for consultation and advice. [www.conservationireland.org](http://www.conservationireland.org)

## Sample Template Form

(This form is not object specific and includes examples of what is meant by physical, chemical, and biological damage)

Name of Collection \_\_\_\_\_

Assessed by \_\_\_\_\_ Date of Assessment \_\_\_\_\_

Inv. No.: \_\_\_\_\_ Cat. No.: \_\_\_\_\_ Photo No.: \_\_\_\_\_

Artist/Maker \_\_\_\_\_

Type of material \_\_\_\_\_

Dimensions: Height \_\_\_\_\_ Width \_\_\_\_\_ Depth \_\_\_\_\_ Weight \_\_\_\_\_

Condition Rating: Good ☐ Fair ☐ Poor ☐

### Treatment Proposal:

#### Maintain

No further action ☐

#### Prevention

Remove secondary support ☐

Offer correct support ☐

#### Conservation

Remedial ☐

Full treatment ☐

Priority Rating: Urgent ☐ High ☐ Medium ☐ Low ☐

Damage description (see below)

	1	2	3	4	5	6	7
<b>PHYSICAL DAMAGE</b>							
<b>(1) Major structural damage</b>							
Parts broken or detached	<input type="checkbox"/>						
Cracks, holes, tears	<input type="checkbox"/>						
Structural weaknesses	<input type="checkbox"/>						
Loss of parts	<input type="checkbox"/>						
Ruptures	<input type="checkbox"/>						
Distortions	<input type="checkbox"/>						
Warping	<input type="checkbox"/>						
Desiccation	<input type="checkbox"/>						
<b>(2) Minor structural damage</b>							
Chipping	<input type="checkbox"/>						
Edge tears	<input type="checkbox"/>						
Creases	<input type="checkbox"/>						
Glazes cracked	<input type="checkbox"/>						
Loose attachments	<input type="checkbox"/>						
Craquelure	<input type="checkbox"/>						
Pigment loss	<input type="checkbox"/>						
<b>(3) Soiling/surface accretions</b>							
Dirt			<input type="checkbox"/>				
Old repairs			<input type="checkbox"/>				
Grease			<input type="checkbox"/>				
Stains			<input type="checkbox"/>				
Staples			<input type="checkbox"/>				
Adhesives/glue			<input type="checkbox"/>				
Retouching			<input type="checkbox"/>				
Fly specking			<input type="checkbox"/>				
<b>CHEMICAL DAMAGE</b>							
<b>(4) Major chemical damage</b>							
Excessive fading				<input type="checkbox"/>			
Discolouration				<input type="checkbox"/>			
Corrosion				<input type="checkbox"/>			
Friable leather				<input type="checkbox"/>			
Foxing				<input type="checkbox"/>			
Friable textile				<input type="checkbox"/>			
Pigment burn				<input type="checkbox"/>			
<b>5) Minor chemical damage</b>							
Fading						<input type="checkbox"/>	
Tonal change						<input type="checkbox"/>	
Tarnish						<input type="checkbox"/>	
Clouding						<input type="checkbox"/>	
Foxing						<input type="checkbox"/>	
<b>BIOLOGICAL DAMAGE</b>							
<b>(6) Fungal</b>							
Mould						<input type="checkbox"/>	
Mildew						<input type="checkbox"/>	
<b>(7) Live infestations</b>							
Furniture beetle						<input type="checkbox"/>	
Woodworm						<input type="checkbox"/>	
Moth						<input type="checkbox"/>	
Silver fish						<input type="checkbox"/>	
Wood lice						<input type="checkbox"/>	
Rodent						<input type="checkbox"/>	

### PHYSICAL DAMAGE

#### (1) Major structural damage

Parts broken or detached ☐

Cracks, holes, tears ☐

Structural weaknesses ☐

Loss of parts ☐

Ruptures ☐

Distortions ☐

Warping ☐

Desiccation ☐

#### (2) Minor structural damage

Chipping ☐

Edge tears ☐

Creases ☐

Glazes cracked ☐

Loose attachments ☐

Craquelure ☐

Pigment loss ☐

### (3) Soiling/surface accretions

Dirt ☐

Old repairs ☐

Grease ☐

Stains ☐

Staples ☐

Adhesives/glue ☐

Retouching ☐

Fly specking ☐

### CHEMICAL DAMAGE

#### (4) Major chemical damage

Excessive fading ☐

Discolouration ☐

Corrosion ☐

Friable leather ☐

Foxing ☐

Friable textile ☐

Pigment burn ☐

### 5) Minor chemical damage

Fading ☐

Tonal change ☐

Tarnish ☐

Clouding ☐

Foxing ☐

### BIOLOGICAL DAMAGE

#### (6) Fungal

Mould ☐

Mildew ☐

#### (7) Live infestations

Furniture beetle ☐

Woodworm ☐

Moth ☐

Silver fish ☐

Wood lice ☐

Rodent ☐

## FACTSHEET 4: DRAWING UP A DISASTER PLAN

### THIS FACTSHEET RELATES TO QUESTION 3.19 AND 3.20 OF THE MSPI (MUSEUM STANDARDS PROGRAMME FOR IRELAND)

This Factsheet is related to Guidelines 3.19 and 3.20 of the Museum Standards & Programme for Ireland (MSPI). It expands on the Guideline by setting out all aspects to be considered in drafting a disaster plan and outlining a structure to follow.

### Introduction

Each museum is a collection unique to itself with its own layout, staffing, opening hours. Therefore only the most general guidelines can be given to help prevent an emergency and then to cope once a disaster has occurred.

For example, is the museum vacated at night or does it have 24 hour security? Are security staff members on duty on each floor or only at the entrance? Is the museum open all year round? If the museum is alarmed, who gets the message - the fire brigade, the nearest Garda station, or a central security firm? Do they know the name and number of the key holder? If the key holder is away, are the emergency services informed of the change and given the name of the new key holder?

There are many different situations and each museum will have to devise its own **disaster plan** appropriate to its own circumstances. There are four key areas to consider when writing it:

1. **Risk Assessment** will identify potential hazards and take steps to **prevent** them occurring.
2. **Disaster Preparedness** ensures that all steps are taken to prepare and equip the museum to handle an emergency. It should include:
  - i) Emergency procedures
  - ii) Evacuation drills and training
  - iii) The formation of a disaster team and emergency contact list
  - iv) The provision of a disaster bin/s
  - v) Prioritisation of the collection for salvage
  - vi) Selection of alternative accommodation
3. **Disaster Response** entails putting procedures in place to allow staff to effectively **respond**, once the alarm goes off, ensuring the safety of public and staff as a priority.
4. **Disaster Salvage** enables effective management of the **salvage** operation once the emergency services have given the 'all clear', to ensure the collections and building are saved.

### 1. Risk Assessment

#### Maintenance

Ensure that the building is well maintained to reduce the likelihood of a disaster occurring. If the museum is closed during the winter make sure that it is checked out every 2-4 weeks. If something is amiss get it repaired immediately. Be especially vigilant of water pipes freezing and then bursting, and of leaves blocking drains so that water enters building (see also Standard 3.2 Building Maintenance).

### **Security**

Seek the advice of the Gardaí at an early stage, not only when the museum is at the planning stage, but also when it is operational. There is a crime prevention officer attached to every Garda division in the country who will advise on security. In the case of a new building, or one which is being re-furbished, the divisional officer can call on the back-up services of the National Prevention Unit based in Harcourt Square, Dublin.

### **Fire prevention**

Consult the fire brigade, not only at the planning or refurbishment stage, but also when the museum is operational. Tell them what your concerns are; they will tell you theirs. It is advisable to have a floor plan of the building showing where the services and fire extinguishers are.

### **Flood**

Avoid storing artefacts in basements which may be flooded. If there is no alternative, try to keep them off the ground and ensure your plan includes specific instructions in the event of flooding.

### **Alarm systems**

Make sure that all systems such as emergency lighting, generators, fire detectors, alarms, fire extinguishers, and 'hot' phone lines are checked regularly. Record the results and list the names and phone numbers of the maintenance contractors. When equipment is serviced this should be recorded in the fire log book (see Fire Safety in Places of Assembly - Ease of Escape Regulations 1985). All staff should be trained in the use of fire extinguishers.

## **2. Disaster Preparedness**

### **Emergency procedures**

Draw up a set of procedures to be followed in the event of an emergency. These instructions outline what to do and who to contact in the following situations: a power failure; theft or damage to the building or contents; fire alarm; flood; medical emergency; suspicious parcel, etc. Consult the staff when writing them and provide training and printed copies of the instructions once approved. Carry out an emergency evacuation drill regularly. Assign a member of staff to each floor to ensure that visitors are led to safety. This will mean clearing not only exhibition spaces but theatres, toilets, AV rooms, etc. Select an assembly point at a safe distance from the museum. Make sure that staff are aware of its location and agree an evacuation process to account for everyone.

### **Emergency procedures: a suggested format**

This model can be adapted to fit a range of potential emergencies and can be made specific to the requirements of a particular collection. The most effective Disaster Plans are carefully tailored to suit the institution's size, collection type and staffing levels.

#### **In the event of a Power Failure**

- Remain calm
- Unplug computers and other electrical equipment
- Telephone security
- Assist to staff and visitors in your immediate area
- Remain where you are or use a torch to move cautiously towards an area which has emergency lights
- If you are in a lift, stay calm; use the telephone or emergency button
- Stand by for instructions from Security
- If you are asked to evacuate the building leave immediately by the nearest normal

- route
- Go to the assembly point
- Report your presence to the person responsible for accounting for people

### **Form a disaster team**

Appoint someone with overall responsibility to act in an emergency. Make a list of those who should be called in to help (including their phone numbers) and decide what role to assign to each person. Include contact details for all staff, volunteers, conservators, maintenance and service providers, suppliers and key stakeholders. Ensure that everyone on the list is happy to be contacted outside normal office hours in the event of an emergency. Revise the list regularly to ensure it is up to date.

### **Alternative accommodation for the collection**

In the event that it became necessary to evacuate the collection, select suitable alternative accommodation; agree who has authority to decide to evacuate; plan how it will be transported to safety and who will supervise the move. Enquire if there are freeze drying facilities in the area.

### **Prioritisation of the collection**

Make a list of the most important items in the collection, deciding in advance what should be saved as a priority in the event of a disaster. Keep this information secure and, if possible, store a copy off-site. Best practice would aim to have at least the salvage priorities in the collection photographed. This does not require a professional photographer if funds are not available – but remember the commercial value of a good photograph. In the event of theft it will be very useful to give the police a photograph of the stolen object.

### **Disaster bin**

Get a disaster bin and decide on its contents in accordance with the risks you have already identified, for most collections this is water or flood damage. The following items may be included: a first-aid box, mops (string headed), buckets, floor cloths, sponges, polythene, paper towels, Wellington boots, disposable and rubber gloves, fire blankets, protective clothing (helmet, goggles, mask), torches, small tools, wire clippers, blotting paper, acid-free tissue paper, absorbent barriers, freezer paper, newsprint, plastic bags of various sizes to put fragments into, waterproof pens to annotate same, tyvek and tie-on labels, cotton tape and bandages, plastic crates, pencils and clipboards, report forms, camera and film. Essentially, include whatever you think might be useful.

Consider having an amount of petty cash available or financial procedures in place for the purchase of further equipment or sustenance for the team during an emergency.

## **3. Disaster Response Measures**

Having tried to prevent an emergency occurring and ensured that you have worked out how to cope with a disaster, the planned procedures will be put into effect. Remember training is key, there is no point having a very detailed colour coded plan if staff are not trained on its contents and how to respond.

## **4. Disaster Salvage Procedures**

Remember, in an emergency priority will be given to saving life. Obey the instructions of the Gardaí and Fire Brigade. Assuming that they have given the 'all-clear' it will be possible to start trying to rescue the artefacts. This is where the contents of the disaster bins should be useful. Review and revise your procedures regularly, especially if there has been an emergency.

## 5. Minimum Requirements – checklist

- Check routinely that all the alarm systems, emergency lighting, sprinkler systems, fire extinguishers, telephones are working properly – keep records of when they are tested and by whom
- Ensure that routine maintenance checks on all aspects of the Building/s are carried out and keep records of when and by whom
- Put a procedure in place for the safe storage and availability of all keys
- Consult the Gardaí
- Consult the Fire Brigade
- Have the phone numbers of the emergency services to hand
- Maintain an up to date contact list for any staff, volunteers, conservators, maintenance and service providers, suppliers and key stakeholders you might need to contact in an emergency
- Have an evacuation procedure in place
- Train staff in the use of fire extinguishers
- Have the equipment checked regularly
- Make a list of the procedures to be followed in the event of an emergency
- Arrange alternative storage for the collection in the event of an evacuation
- Get a disaster bin/s and stock with appropriate material and maintain

### Useful references and resources:

**The National Disaster Response Plan** is a formalised arrangement to help heritage collections of national significance in the face of an environmental disaster. The scheme has been generously sponsored by the Council of National Cultural Institutions (CNCI) and is available to any museum, library, archive or cultural collection of national or local significance across the 32 counties.

A number of essential and highly-specialised Disaster Response materials are available to handle water damage and mould remediation in the days immediately after a disaster. This includes water absorbent cushions and dehumidifiers to remove water and moisture from a flood or leak site; heavy duty blotting paper to dry wetted collections as well as essential hand tools and smaller useful items for salvaging mixed collections.

To have access to these materials in the event of an emergency all you need to do is register as a participant of the scheme, there is no charge. You will need to stock your own disaster bin/s though. For more details on how to register please contact the scheme at [cnciconservation@gmail.com](mailto:cnciconservation@gmail.com)

**Harwell Document Restoration Services** is the leading commercial provider of specialist salvage services for the heritage sector the UK and Ireland. You might consider becoming an annual subscriber. Over 800 institutions already subscribe, including most local authorities, each of the UK and Ireland's respective national libraries and archives and many others. [www.hdrs.co.uk](http://www.hdrs.co.uk)

**Building an Emergency Plan: A Guide for Museums and Other Cultural Institutions** Published by The Getty Conservation Institute (1999) The J. Paul Getty Trust, Los Angeles, USA. Available as free download at [www.getty.edu/conservation/publications](http://www.getty.edu/conservation/publications)



## FACTSHEET 5: WRITING A CARE OF COLLECTIONS STRATEGY

THIS FACTSHEET RELATES TO QUESTION 3.21 OF THE MSPI  
(MUSEUM STANDARDS PROGRAMME FOR IRELAND)

### Introduction

Strategic Plans are best developed through an internal process of discussion and review; so you need to identify all the relevant staff and get them involved from the start. Your **Care of Collections Strategy** needs to be directly linked to your **Institution's Strategic Management Plan (SMP)** which is required to achieve Interim Accreditation. If you were not involved in drawing it up, then discuss how it was developed with your colleagues who did.

If your institution's SMP is currently being written or revised it is worth starting discussions as soon as possible with key staff on what is likely to go into it; as a number of the Strategic Aims and objectives for the SMP will need to be mirrored in the Caring for Collections Strategy.

Please refer to requirements and guidelines for Standard 2.6 Strategic Management Plan and current Annual Action Plan.

### Situation Review

Before you start writing the strategy you need to sit down and evaluate the condition of your facilities and the collection as a whole.

This includes:

- Structural condition of the building - interior and exterior
- Assessment of the condition of the collection
- Environmental conditions
- How collections are handled and accessed
- Storage facilities
- Exhibition facilities
- Disaster planning
- Training

If you take the time to evaluate current practice across this range of topics it can be quite straightforward to then put together a strategic plan for actions identified as requiring attention.

Please refer to **Care of Collections Situation Review** Factsheet 6. This useful checklist directly refers to Susan Corr's publication *Caring for Collections: A Manual of Preventive Conservation*. If you wish to carry out more in-depth reviews this factsheet also lists other useful tools at the end

### Template for writing your Caring for Collections Strategy

This is a simple template or checklist of what to include when writing your Strategy and does not need to be followed to the letter. Remember it is more important that the Strategy's structure and terminology are consistent with those used for your institution's Strategic Management Plan (SMP).

#### 1. Mission Statement for your Institution

This is a Minimum Standard for Interim Accreditation

## 2. Situation Review

Deriving from your Situation Review (see above) which may be referenced as an appendix, this should be an introductory paragraph or two outlining the current state of Collection Care at your place of work and aspirations for the future.

Also include a general statement about resources - for example:

*This Caring for Collections Strategy is for a five year period 2015-2020. Many of the objectives can and will be met using existing staff and funding available; however the strategy also covers objectives that cannot be addressed without the investment of additional resources.*

## 3. Strategic Aims

Concentrate on a small number of realistic and achievable aims or goals. These should **not** be short-term or 'quick fix' aims (such as fix the roof or purchase new storage shelves) but key issues that will concern the Collection over the medium to long-term period. They will generally **not** be achievable in twelve months.

For example:

- To provide environmental stability for all Collections during storage, handling and display
- To ensure the long-term preservation of the Collections
- To stabilise and improve the storage conditions of the collection
- To conserve the key priorities of the collection
- To raise awareness of preservation issues to museum visitors and researchers

However you word it, your strategic aims should ensure the long term care of the collections and should be directly linked to aims in your Strategic Management Plan (Standard 2.3)

## 4. Objectives

Then list the objectives for achieving each goal - some of these will be quite simple to achieve with existing staff and resources within a twelve month period or less; while others may take years to implement.

## 6. Action plan

Your key objectives should then be broken down on an annual basis into smaller tasks that will be carried out over a year and reflected in the organisation's Annual Action Plan (Standard 2.3). A member of staff should be made responsible for each task or action and a target date for completion agreed. Any additional resources needed to complete the task on time must be identified. It is essential that you are realistic when setting completion dates and that all staff responsible are involved when setting them.

## Template table for a Care of Collections Strategy

**Strategic Aim 1:** To stabilise and improve the storage conditions of the collection

Objectives	Year 1	Year 2	Year 3	Resources
1. To ensure that all storage materials are archival/conservation grade	■	■		
2. To monitor environmental conditions	■	■		
3. To improve access to Collections		■	■	

## Template for table for Annual Action Plan

**Strategic Aim 1:** To stabilise and improve the storage conditions of the collection

**Objective 1:** To ensure that all storage materials are archival/conservation grade

Task	Responsibility (Staff member)	Target Date for completion	Resources needed	Review Date for task
1. Carry out condition assessment of collections – this will include condition of existing storage materials				
2. Remove all acidic, dirty or damaged packaging				
3. Identification of new storage materials required and estimated costs				
4. Introduce a programme of rehousing				

### 5. Review procedures

This should list when the Strategy was formally adopted and by who, as well as how often your institution will review the document and corresponding Annual Action Plan.

For example: *This five-year plan will be reviewed annually. Key objectives that require interim review will be the subject of a six month review. All reviews will take the form of meetings between the Director and Curator. Progress and any problems will be discussed against each objective using the strategy as a guide.*

## FACTSHEET 6: CARE OF COLLECTIONS SITUATION REVIEW

### THIS FACTSHEET RELATES TO QUESTION 3.21 OF THE MSPI (MUSEUM STANDARDS PROGRAMME FOR IRELAND)

One of the central issues when caring for a collection is that that no further damage is caused to the objects. Collections need to be provided with a sympathetic environment so that incipient problems are not aggravated. Proper storage will retard deterioration and correct handling techniques will prevent further damage.

Please refer to *Caring for Collections: A Manual of Preventive Conservation* by Susan Corr, published by the Heritage Council (2000).

You do not need to submit this completed checklist as part of the accreditation application, it should be used as a guide for carrying out a situation review and relevant areas needing review should be added as required to fit your institution.

### 1. Structural Condition of the Building - Exterior

The building is the initial layer in a series of protective structures around the collection. The fabric of the building is the primary barrier against the exterior climate and must be properly maintained in order to regulate the interior climatic conditions (see: *Caring for Collections: A Manual of Preventive Conservation*, pp 15-19).

Regularly check the outside of the building and form a strategy to combat problems as they arise. Use this section to detail any on-going maintenance issues you have and list timeframe for any identified repairs needed.

Checklist - Exterior	Good/Adequate/ Poor/ Unacceptable	Strategy	Timescale	Cost
Roof				
Guttering/drains				
Pointing				
Chimneys				
Doors/windows				
Decorative order				

### 2. Structural Condition of the Building - Interior

The fabric of a building warms and cools in response to weather conditions and direct sunlight. How quickly this affects the interior climate is a measure of the insulating properties of the building. This may need to be addressed at a fundamental level but there is much that can be done from a good housekeeping point of view to improve the thermal retaining properties of a building (see: *Caring for Collections: A Manual of Preventive Conservation*, pp 19-20).

Regularly check the interior of the building and form a strategy to combat problems as they arise. Use this section to detail any on-going maintenance issues you have and list timeframe for any identified repairs needed.

Checklist - Interior	Good/Adequate/ Poor/ Unacceptable	Strategy	Timescale	Cost
Insulation				
Draught-proofing				
Decorative order				
Use of safe materials (non-off gassing)				
Preventative maintenance schedule				

### 3. Environmental Conditions

Light, heat, humidity, and air-borne pollutants are the main elements that determine environmental conditions within a building. It is recognised that continuous fluctuations, particularly of heat and humidity, are more damaging than conditions that fall outside the recommended parameters but remain constant (see: *Caring for Collections: A Manual of Preventive Conservation*, pp 19-29).

Regularly check the environmental conditions within the building and form a strategy to combat problems as they arise. Use this section to detail any on-going issues in environmental conditions in your building; where relevant highlight any potentially problematic variations in conditions and any identified actions required.

Checklist - Environmental Conditions	Good/Adequate/ Poor/ Unacceptable	Strategy	Timescale	Cost
Light				
Heat/cold				
Humidity				
Air pollutants, dust and dirt				
Insect activity				

### 4. Environmental Monitoring

Monitoring means keeping a regular eye on the building and its contents - from a simple visual routine to the use of instruments that record and measure environmental factors like the amount of light in a room or the level of moisture in the atmosphere.

Regular monitoring develops a picture of what is happening to a collection over time (see: *Caring for Collections: A Manual of Preventive Conservation*, p 47). Outline policy of monitoring the environment:

who is responsible for analysing readings and how the results are responded to?

Checklist - Environmental Monitoring	Good/Adequate/ Poor/ Unacceptable	Strategy	Timescale	Cost
Regularity of monitoring				
Interpretation of results				
Response plan				
Availability of instrumentation				
Maintenance and calibration of instrumentation				

## 5. Objects

An inventory of the collection must be compiled as a matter of course and every object assigned a unique inventory or Object ID. This number should be attached to every document relating to the object; from condition reports to correspondence (see: *Caring for Collections: A Manual of Preventive Conservation*, pp 44-46).

Outline current policy; use this section to detail any on-going issues you have identified and actions required.

Checklist - Objects	Good/Adequate/ Poor/ Unacceptable	Strategy	Timescale	Cost
Object documentation, ID				
Photographic record				
Condition statement				

## 6. Handling and Access

Physical damage occurs most frequently during handling and access of material. Objects need to be handled with respect and care and should be correctly supported at all times (see: *Caring for Collections: A Manual of Preventive Conservation*, pp 50-52). Outline current policies and detail any on-going issues you have identified and actions required.

Checklist - Handling and Access	Good/Adequate/ Poor/ Unacceptable	Strategy	Timescale	Cost
Awareness of correct handling procedures				
Availability of protective wear, gloves, supports, etc				
Instruction notice to public of preservation measures				
Staff training and instruction				

## 7. Storage

The storage of objects ultimately guarantees their preservation. Inappropriate storage causes damage and, given that only a small percentage of a collection is usually on display, this damage can extend to most of the collection (see: *Caring for Collections: A Manual of Preventive Conservation*, pp 52-53). Insert summary of storage conditions; use this section to detail any on-going issues you have identified and actions required.

Checklist - Storage	Good/Adequate/ Poor/ Unacceptable	Strategy	Timescale	Cost
Suitability of storage space				
Suitability of storage system (racks, drawers, shelves)				
Appropriate organisation of objects				
Environmental conditions in store:				
1. Light				
2. Temperature				
3. Humidity				
4. Pollutants				

## 8. Exhibition

Objects on exhibition must be carefully displayed with due regard for the materials from which they are made. The better adapted the surrounds to meet the need of the objects, the less likely they are to be damaged by being displayed or exhibited (see: *Caring for Collections: A Manual of Preventive Conservation*, pp 56-60). Insert summary of exhibition conditions; use this section to detail any on-going issues you have identified and actions required.

Checklist - Exhibition	Good/Adequate/ Poor/ Unacceptable	Strategy	Timescale	Cost
Suitability of exhibition space				
Suitability of supports & mounts for exhibition				
Environmental conditions in the exhibition space:				
1. Light				
2. Temperature				
3. Humidity				
4. Pollutants				
Level of environmental control offered by cases				
Security				

## 9. Disaster Planning

Despite the best of intentions things can go wrong on a disastrous scale and the collections may need to be evacuated. The risk of further damage after the event can be significantly reduced if people are prepared and have a number of agreed procedures (see: *Caring for Collections: A Manual of Preventive Conservation*, pp 61-62). Insert details of disaster plan; use this section to detail any on-going issues you have identified and actions required. See also *Guidelines/Appendix on Writing a Disaster Response Plan*.

Checklist - Disaster Planning	Good/Adequate/ Poor/ Unacceptable	Strategy	Timescale	Cost
Protocol for contacting keyholders				
Contact with emergency services				
The formation of a disaster team, including conservators				
Prioritisation of the artefacts				
Alarm systems, maintenance & evacuation drills				
Provision of a disaster bin				
Alternative accommodation for the collection				



**Other useful tools when carrying out a situation review:**

There are some excellent guides produced by the Department of the Environment on how to Care for Historic Buildings. They include some very useful checklists and can be downloaded for free from: [www.ahg.gov.ie/en/Publications/HeritagePublications/BuiltHeritagePolicyPublications/](http://www.ahg.gov.ie/en/Publications/HeritagePublications/BuiltHeritagePolicyPublications/)

If you haven't already completed a **Facility Report** for your institution it is worth doing so now; it lists the general requirements considered when your organisation requests to borrow an object on loan for exhibition. The Facilities Report devised by the United Kingdom Registrars Group in consultation with the Museums, Libraries and Archives Council is available free to download at: [www.ukregistrarsgroup.org/publications](http://www.ukregistrarsgroup.org/publications). Alternatively the Registrars Committee of the American Association of Museum's facility report from the United States is available free to download at: [www.rcaam.org/](http://www.rcaam.org/)

The UK's Collections Trust Benchmarks for Collection Care checklist runs to 56 pages of questions, it is extremely thorough and is a very useful prompt when carrying out your own situation review. Available to download free at: [www.collectionslink.org.uk/programmes](http://www.collectionslink.org.uk/programmes).

## FACTSHEET 7: EXHIBITION STANDARD

**THIS FACTSHEET RELATES TO QUESTION 5.1, 5.3 AND 5.4 OF THE MSPI (MUSEUM STANDARDS PROGRAMME FOR IRELAND)**

This Factsheet is intended to offer enhanced guidance on the Exhibition standards [5.1-5.4], and in particular to offer greater clarity on Consistent Approach to Labelling [5.1], Visitor Survey and Evaluation of Exhibitions [5.3] and Exhibition Policy [5.4].

### 1. Why exhibitions are critical to the success of a museum and how they fit into the overall mission

Given that the mission of any museum revolves around the care and display of its collections, it is clear that the exhibition space – its style, content and layout – is the prime means by which the museum communicates with its visitors. A museum standards process, therefore, must inevitably have some regard for the main interface between the museum and its public. Yet it is not a straightforward task. The easiest standards to adjudicate are those that measure the measurable. But exhibitions are an area where qualitative values prevail: imagination, humour and quirkiness can be among the hallmarks of an excellent exhibition, but these qualities are not easy to define, let alone measure. Each successful exhibition will differ from others because it will have tried to articulate what is unique (and often idiosyncratic) about its own collection, or the story it has to tell. There is no one size that fits all.

### 2. Exhibitions and standards

Nevertheless, exhibitions do have some measurable features that are indicative of a museum's pride in its work and commitment to communicating with its audience. Poorly maintained, badly lit, and seldom changed exhibitions, malfunctioning audio-visual equipment, impossible-to-read text and poor access for the disabled, are seldom found in the well-managed museum, but often found in a poorly-run one.

Good exhibitions do not exist in isolation: they are rooted in the organisational culture of the museum – specifically in the sense of mission and quality of strategic thinking that museum leaders and staff bring to bear on their work. So the first task of the Exhibition Standards in MSPI is to check that a museum's mission, strategy and ability to interpret its own collections are aligned. There will be a discernible relationship between the museum's sense of its core identity and *mission*, the logic of its *collection policy* and the quality of its *interpretative planning* that will be manifest in its exhibitions.

The second exercise is to measure what is measurable, that is to check whether the exhibition space is sufficiently resourced and meets an acceptable standard of basic housekeeping.

- Are the space, display cases and contents regularly cleaned?
- Is there evidence that things which break down or fall into disrepair are being fixed promptly?
- Is there evidence of active change or re-arrangement of the contents?
- Are all of these processes supported by routine maintenance and dedicated exhibition budgets?

### 3. Consistent approach to text and language-based museum content

Prior to the advent of modern (and increasingly cheaper) audio-visual media, the predominant way of conveying the meaning of museum objects was by labels and graphic stills (photographs, wall or board-mounted illustrations etc.). However, text still remains the cheapest and one of the most effective ways of providing visitors with information. Consistency of approach to the amount of words used in both graphic

panels and text labels is still critical to providing the visitor with an intellectually and psychologically coherent experience. There are no hard and fast rules about the number of words to be used in any one context, but *conciseness* is an obvious goal. Thus the *Manual of Museum Exhibitions* (B. Lord and G.D. Lord, 2002, 398-99) has recommendations for the number of words in the main title (6-8 words) and explanatory content (60-80 words). It also provides indicative font sizes (14-18 point). In the design process, it is always feasible to vary these parameters – but the main requirement for MSPI standards will be *consistency*.

In principle, consistency should extend to cover all text content of an exhibition, including that presented in multi-media. Text appearing on monitors and interactive displays should show a similar concern for conciseness. The temptation to load – or more often overload – such media with information should be resisted.

An alternative to text-based content is sound or voice-based content. The use of multi-media should be seen as an opportunity to add variety, entertainment value and educational effectiveness to an exhibition's content. Once again, conciseness is a standard: a narrator droning on about a subject audibly is no less taxing of a visitor's interest and attention than large expanses of text.

The deployment of all media should be centred on the visitor experience. For example, loud sound installations can be a form of noise pollution that may prove distracting or irritating to a visitor's enjoyment of other aspects of the experience. Your exhibition survey should check to see whether you are getting the balance right.

We should not forget also that human mediation (a tour of the exhibition space by an informed guide or attendant) is one of the most effective forms of communication. But this should be carefully planned to ensure that an exhibition is sufficiently self-explanatory to give the visitor a rewarding experience when a guide is not available.

#### 4. Communication and effective feedback – the importance of visitor surveys

There is really only one way to check whether a museum's efforts to communicate with its visitors through the medium of its exhibitions have been successful: ask them. Finding out whether an exhibition's message has been received, understood and enjoyed is essential to changing existing displays and planning future exhibitions effectively. Hence the importance of a survey process focused specifically on the effectiveness of exhibitions.

#### 5. The difference between an exhibition survey and a general visitor survey

In the MSPI standards, the surveying of visitors is split between an exhibition survey (5.3) and a general visitor survey (7.7 and 7.8). It is important to understand the different objectives of these two standards. The purpose of the exhibition survey is to find out whether the museum's core offering is effective, and if not to use the feedback to redesign or realign its contents to ensure a better result. It can also be used to guide exhibition planning more broadly, for example in devising a more effective programme of temporary exhibitions.

The general visitor survey is designed to assess visitors' level of satisfaction with all aspects of the museum experience, which includes such information as how they found out about the museum, whether signposting was effective, the welcome warm, the toilets clean, the cakes in the restaurant delicious, the contents of the bookshop worth buying, and so on. Almost all of this information feeds logically into the museum's marketing strategy.

## 6. The problem with 'permanent' exhibitions

Many of the MSPI standards are designed to ensure that the museum is capable of taking permanent care of its collections, but permanence is not a desirable quality of museum exhibitions. Yet it is striking how easily museum staff can slip into referring to the 'permanent exhibition'. What this often really means is that the main exhibition cost a fortune to produce and is therefore forbiddingly expensive to change, or that permanence is a symptom of a wider inertia. All museums, regardless of scale, should be thinking about and implementing some kind of change in their exhibition offerings. Preferably, all museums should have a *temporary* exhibitions programme, reviewed on an annual basis. But even resource-strapped museums should seek to change the contents of their main exhibition periodically, if only to exchange some objects on display with some from the collection. Rotating objects between collection and display is a relatively low cost operation for even the most poorly-funded museum, and is at least an indicator of some desire to show off as much as possible of the collection and provide variety for its visitors.

## 7. The questions that matter for your survey

Rather than providing a rigid template for an exhibition survey here, it might be more useful to suggest some of the key questions that might be asked, leaving some flexibility and discretion for each museum to design its own questionnaire format. There is no need for the questions to be the same on each occasion, and in some cases they can be quite specific. For example, you might like to know whether a specific audio-visual installation added since the previous survey has contributed positively to the visitor experience. But here are some questions that might be included in any survey:

- Did you find the story told through this exhibition interesting and engaging? [effective communication]
- Was the story clearly told, or confusing? [effective communication]
- Did you find it easy to find your way around it? [effective signposting, orientation, navigation]
- What aspect of it did you find most memorable or enjoyable? [impact]
- Was enough information provided to help you understand the objects and the story they have to tell? [effective communication]
- Is there too much, too little, or just the right amount of text? [effective communication]
- Are we getting the balance right between graphics, audio-visual media and object right in the overall presentation? [effective design and communication]
- If there was one thing we could do to make it a better exhibition, what would it be? [identifying weaknesses, planning for improvement]

## 8. Exhibition Policy

So, what is an exhibition policy? It is essentially the clear expression of the museum's sense of how it uses the multi-media language of display to communicate effectively and engagingly with its audience. It is the product of:

- (a) a sense of the museum's identity and mission, based on a clear sense of the unique qualities of its collection
- (b) a collections policy that ensures the collection's contents are aligned coherently with that mission
- (c) a process of exhibition planning, based on visitor feedback, that informs changes and improvements to the main exhibition and the programming of temporary exhibitions.

Therefore, writing an exhibition policy should be informed by other MSPI standards. The ones to pay particular attention to are: Mission Statement [1.1]; Collection Policy [1.5]; Education Policy [6.6]; relevant sections of the Strategic Management Plan [2.3] and Financial Plan [2.6].

## FACTSHEET 8: EVALUATION OF EXHIBITIONS

THIS FACTSHEET RELATES TO QUESTION 5.3 OF THE MSPI  
(MUSEUM STANDARDS PROGRAMME FOR IRELAND)

### 1. Evaluation of Exhibitions: Visitor Survey

The following questions are minimally suggested for use in the Visitor Survey. These questions can be adapted to use with regard to both permanent and temporary exhibitions.

Museums may use these or customise their own survey based on the Guidelines.

- 1) Would you recommend this exhibition to friends? If not, why not?
- 2) What did you like most about the exhibition?
- 3) What did you like least?
- 4) Have you any suggestions as to how we could improve it?
- 5) Did you learn or gain anything from the exhibition?
- 6) Would you come back yourself?

The respondent may recommend the exhibition to a friend but, having seen the exhibition once, may feel no need to return themselves. This has implications for future repeat visits.

The form must also have a space to note the nationality, age, and family unit of the respondent.

See also Factsheet 7: **Exhibition Standard** for guidance on the difference between the Evaluation of Exhibitions Visitor Survey (5.3) and a general Visitor Survey (7.7; 7.8). Factsheet 7 also suggests a further range of questions that may deepen your understanding of visitor responses to your exhibitions.

### 2. Survey Methodology

- Survey a minimum of 100 people to achieve a large enough sample base
- Undertake the survey in the summer months:
- There are more visitors so the survey is easier to carry out
- There is more likely to be a mix of visitors from different countries
- Use an interviewer – if a form is left for visitors to fill in themselves only conscientious or interested parties will complete it and the return will be biased
- The survey can be conducted by anyone – there is no need to use a trained market researcher
- To ensure impartiality, use student or a non full-time member of staff to conduct the survey and record responses
- Choose a neutral way to select respondents – for example, every third person exiting the exhibition may be asked to do the survey

### 3. Survey Frequency

A survey of the exhibitions in a museum should be conducted at least once in the five year accreditation cycle. This is the minimum standard according to the Guidelines.

- If the exhibition remains unchanged there may be no benefit in repeating the survey
- If changes are made to improve the exhibition it is recommended that the survey be repeated
- The results of the survey must be documented for reference for future improvements and reporting purposes

## 4. Analysing the Data

### Questions 1 and 6:

- 1) Would you recommend this exhibition to friends? If not, why not?
- 6) Would you come back yourself?

These can be analysed as '74% said yes' and '26% said no' in text or graph form.

### Questions 2, 3, 4 & 5

- 2) What did you like most about the exhibition?
- 3) What did you like least?
- 4) Have you any suggestions as to how we could improve it?
- 5) Did you learn or gain anything from the exhibition?

A pattern will emerge from the survey with several main elements arising for each of these questions. A grid of results or a short (5 page) report can demonstrate the analysis of the results.

The results can be used as part of the basis for a development plan for the coming year(s). The assessment should take no more than two days but may greatly influence decisions made about the future development of exhibitions in the museum.

### Notation of nationality, age, family unit of the respondent:

This information is important to contextualise the responses. For instance, maybe all family units will comment about a lack of interpretive material, or all non-English speaking nationalities may comment about the lack of language provision.

The results must also be assessed in relation to visitor statistics data (see Questions 7.7 and 7.8 in the MSPI Standards and Guidelines).

## FACTSHEET 9: DEVELOPING AN EDUCATION POLICY

**THIS FACTSHEET RELATES TO QUESTION 6.6 OF THE MSPI  
(MUSEUM STANDARDS PROGRAMME FOR IRELAND)**

The process of developing and drafting an education policy may take up to six months depending on the nature and scale of the institution and the level of research and consultation carried out. The education policy must be formally approved by the governing body.

The following 10-step approach is a guideline for museums to follow.

### 1. Background Research

Research and document the following:

- What resources are available in the museum for education: collections space, money, time, and facilities - can these be supplemented?
- Identify the skills and expertise of the museum's staff, friends, and volunteers - is any further training required?
- Profile the museum's visitors and potential visitors - outline their expectations and needs, including learning needs
- Identify the museum's external competition

### 2. Conduct a SWOT Analysis

Carry out a SWOT (Strengths, Weaknesses, Opportunities, and Strengths) Analysis with museum staff:

- Examine existing provision, collections, budgets, expertise of staff and volunteers
- List the museum's strengths and weaknesses
- Review external factors: changes in education, technology, social trends, funding opportunities
- List potential opportunities and threats

### 3. Education Mission Statement

Draft an Education Mission Statement for the museum. It must concisely set out the museum's vision for education in one or two sentences, and should derive from the overall Mission Statement of the museum. Involve as many staff/volunteers as possible in developing the Education Mission Statement.

### 4. Context

Write a brief summary of the history of education provision in the museum. Summarise the role of education within the museum and its overall approach. This should include areas such as: target audiences, learning needs, market research, types and quality of provision, exhibition development, evaluation, marketing, training, networking, and resources.

### 5. Aims of the Education Policy - where does the museum want to be?

Aims should be appropriate, realistic, and achievable. These are the museum's broad, long-term goals over three to five years. The aims must be based on research carried out and must state who the museum is going to be working with, the approach it is going to take, and what it hopes to achieve. There should be no more than six stated aims. For example:

- i. 'To widen the range of activities available to adults.'
- ii. 'To involve local community groups in developing a community-based programme which will improve the services and resources available at the museum and broaden access to the collection(s).'
- iii. 'To develop a team-based approach to exhibition planning and design which will ensure that future exhibitions will be better able to meet the learning needs of target audiences.'

## 6. Objectives of the Education Policy – how is the museum going to get there?

Objectives should be **SMART**:

Specific,  
Measurable,  
Agreed,  
Realistic/Relevant, and  
Time-bound

Each aim must have a number of objectives demonstrating how the museum is going to achieve that particular aim. For example, if the aim is: 'to widen the range of activities available to adults', the corresponding objectives might be:

- i. To develop reminiscence work by working with community groups.
- ii. To run blocks of classes for adults that would engage them in working co-operatively to understand and enjoy the museum's collections.
- iii. To offer four classes as part of the artist-in-residence programme at a level appropriate to adults.

## 7. Annual Action Plan – how will the museum meet the objectives of the Education Policy?

The Annual Action Plan is a one-year plan. It must identify the individual tasks to be completed under each objective, specify who will do them, when, and what the cost will be. This can be set out in narrative or tabular format (see below).

Activity	Audience	Tasks	Staff Responsible	Other Key Players	Target Date	Resource/ Budget	Evaluation/ Review
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## 8. Consultation

Review the draft policy with relevant individuals/groups and make amendments as appropriate.

## 9. Performance Indicators – have the objectives been reached?

These measures should be both quantitative (numbers of visitors, events, work packs) and qualitative (user satisfaction surveys, comments books, focus groups).

## 10. Monitoring and Review of Policy

It is recommended that the Action Plan be reviewed annually.



## FACTSHEET 10: VISITOR STATISTICS SURVEY FORM

**THIS FACTSHEET RELATES TO QUESTION 7.7 AND 7.8 OF THE MSPI  
(MUSEUM STANDARDS PROGRAMME FOR IRELAND)**

1. Museums may use this Factsheet as a template Visitor Statistics Survey form
2. Where museums use their own Visitor Statistics Survey form, all of the categories listed below must be included for the survey to meet the Standard

Date	Time of arrival	Time of departure	Length of visit	Nationality	Number in party	How they heard about the museum

An Chomhairle Oidhreachta  
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