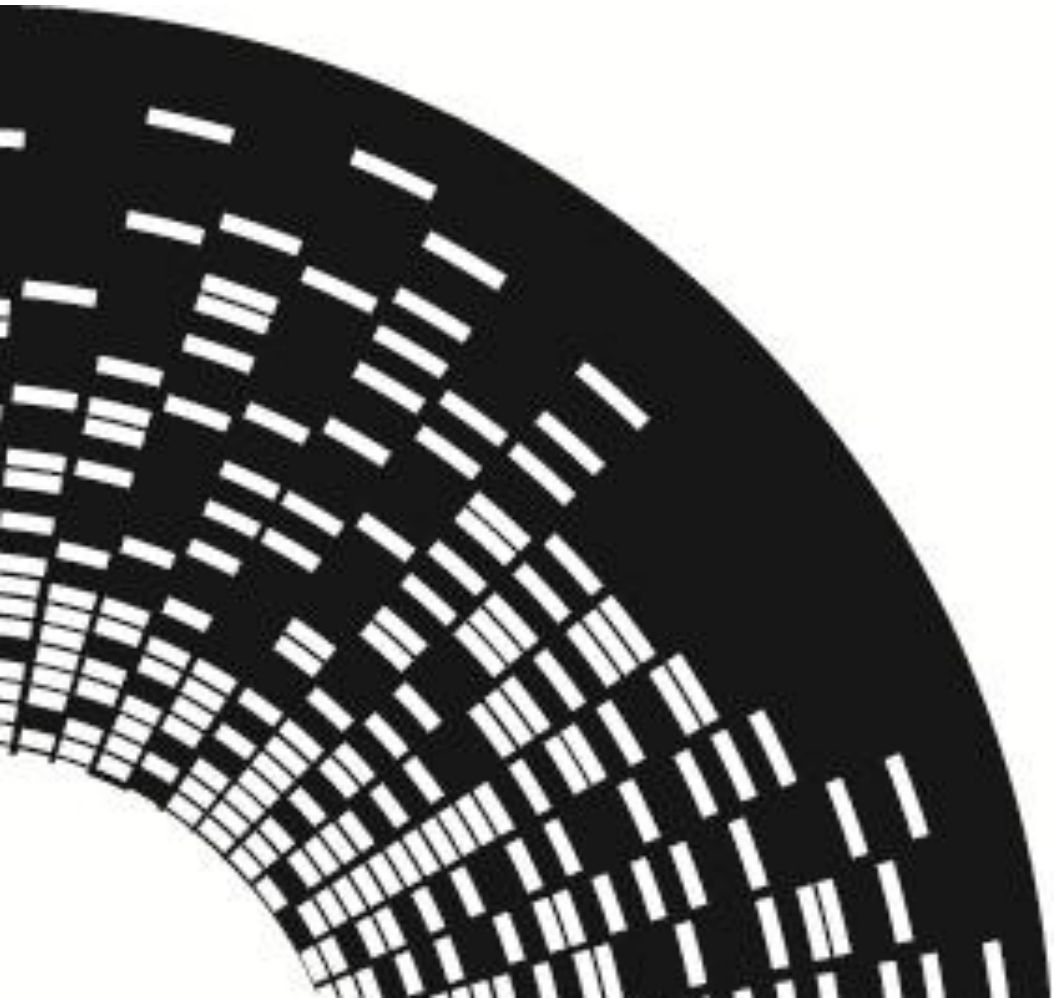
ACCREDITED MUSEUM

Accreditation guidance

Section three:
Users and their experience

June 2014



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Introduction

This document is part of a set of guidance documents aimed at supporting museums that are preparing an application or return for Accreditation, to help them understand how their application or return will be assessed.

This version of the 'Guidance – section three' dated June 2014 replaces the previously published version dated February 2013. The Accreditation guidance documents supplement the Accreditation Standard (2011) and outline how you might approach completing your return. The guidance documents will be reviewed annually to ensure they remain current and relevant. Should you have any feedback on the guidance please email accreditation@artscouncil.org.uk at any time. The guidance will next be re-published with revision where appropriate in February 2015. All substantive changes are contained within dated boxes for clarity.

This document provides guidance on meeting the third section of the Accreditation Standard – users and their experiences – and should be read alongside the Accreditation Standard, the guidance introduction document, and the guidance documents for the two other sections of the standard – organisational health, and collections. All of these documents are available to download from the Arts Council's website at www.artscouncil.org.uk/what-we-do/supporting-museums/accreditation-scheme/.

The Accreditation Standard states users and their experiences as one of three sections that a museum must meet to gain Accreditation. This section is broken down into three requirements, and each of these is listed here, along with:

1 **General guidance on this requirement, relevant to all museums**

2 **Scaled guidance on this requirement, relevant to specific museum types (where appropriate):** The scales are explained fully in the main introduction to the guidance [see 'Scalability indicators', page 13]. Scales will not apply to each requirement, and are intended as a guide only.

3 **Documentation and information needed for this requirement and where that information may be found**

4 **Questions about this requirement that should be considered as part of the assessment:** These questions are not the ones that will be asked on your application form and are not additional requirements. However, your assessor will be using them when considering the information you provide through an application or return form. Ensure each is addressed clearly and appropriately to your organisation, and be sure the assessor can identify your answers.

Where it is relevant, questions from the Museums Galleries Scotland (MGS) Quality Improvement System[1], a self-assessment tool for museums and galleries, have been included.

[1] www.museumsgalleriesscotland.org.uk/the-programmes/quality-improvement-system/

Requirement 3.1

Good-quality services and development

‘The museum must offer and develop good-quality, stimulating services for users and potential users, in order to get the best out of its collections, resources and local area.’

3.1.1

The museum must understand who its users and non-users are

General guidance on this requirement, relevant to all museums

a) The museum must demonstrate that it has a clear awareness of the breadth of current users and stakeholders, informed by the collection of data on users. The museum should evidence understanding of its users and non-users through the forward plan (see requirement 1.4).

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b) The museum must have methods in place for identifying non-users and the barriers to participation. Museums might consider reviewing the demographics of their local area and consider why certain groups may not be attending.

c) The museum must have a process for consulting its users in relation to services provided and users’ needs.

d) Consultation with users and non-users can be undertaken in a number of ways, for example, focus groups, museum panels, community groups in open dialogue, visitor books, comments cards, social media and questionnaires.

e) User and non-user consultation may take place in a variety of locations (not just at the museum) and may include access to community groups, street surveys with local people, contact with local charities, contact with local schools, working in partnership with other cultural organisations to do research etc.

f) For consultation, museums should be aware that users and stakeholders include a wide range of people in addition to the museum visitor, for example, the local community, museum workforce, museum trustees or board members, museum funders, local charities and interest groups, educational bodies, local businesses, other local attractions, donors or anyone that will be or is affected by the museum's actions directly or indirectly.

Scaled guidance on this requirement, relevant to specific museum types

Independent museums types one and two

The museum should evidence understanding of its users and non-users through the forward plan (see requirement 1.4). The requirement to demonstrate consultation with users and non-users does not necessarily mean resource-heavy or costly market research should be bought in. Where smaller museums are embedded within their local and/or specialist communities, the views gathered from local and/or specialist stakeholders to consider activity, partnerships, etc., is acceptable as evidence. Many museums will undertake much of this activity already. Museums should formalise partnership meetings by taking notes, minuting, and recording opinions for use in developing next steps for forward planning. The museum will need to show what methods it uses for data collection, for example, annual visitor survey, visitor book, comments cards, and direct feedback to the workforce from visitors.

Independent museums type three

Larger independents should consider formal consultation such as regular focus groups from various sections of users and non-user communities. Data collection processes should be standardised across the museum, with specific and relevant data categories identified and collected across all museum activity. Benchmarking should be used to track progress.

Local authority museums

Understanding of the primary audience for the museum and current users of the museum is evidenced in the museum's forward plan and wider strategic plans (for example, for learning, audience development and engagement, collections, programming etc.). Consultation processes will follow the basic museum practice of visitor books, comments cards, exit surveys etc, but will also link to the governing body's consultation and public engagement requirements.

Data collection processes should be standardised across the museum and any associated sites, with specific and relevant data categories identified and collected across all museum activity. Where possible, the museum should utilise wider local authority data collection, for example, postcode data. Benchmarking should be used to track progress.

University museums

Understanding of the primary audience for the museum and current users of the museum is evidenced in the museum's forward plan and wider strategic plans (for example, for learning, audience development and engagement, collections, programming etc).

Consultation processes will follow both the basic museum practice of visitor books, comments cards, exit surveys etc, but will also link to the governing body's consultation and public engagement requirements as appropriate.

Data collection processes should be standardised across the museum and any related sites, with specific and relevant data categories identified and collected across all museum activity. Benchmarking should be used to track progress.

National museums

Understanding of the primary audience for the museum and current users of the museum is evidenced in the museum's forward plan and wider strategic plans (for example, for learning, audience development and engagement, collections, programming etc).

Consultation with users and non-users will be formalised and will incorporate a range of mechanisms appropriate to groups identified. Data collection processes will be standardised across the museum and any related sites, with specific and relevant data categories identified and collected across all museum activity. Benchmarking should be used to track progress. User research should be published in some form.

Documentation and information needed	Where it may be found
Information on application/return form	Forward plan
Evidence in forward plan	Audience development plan
	Wider strategic plans
	Workforce structure

Questions about this requirement that will be considered as part of the assessment

- are the current users of the museum identified in the relevant section of the forward plan/audience development plan?
- what data does the museum currently collect? How frequently is data collected?
- does consultation with users and non-users go into an appropriate depth (for example, in relation to services provided and users' needs)?
- does the museum demonstrate an awareness of potential users and groups not currently accessing the museum?
- **QIS** How well does the museum engage with a variety of users and partners in the planning and development of its service?

The museum must evaluate and analyse information to assess users' needs

General guidance on this requirement, relevant to all museums

a) The museum understands the value of evaluation.

b) The museum must have a process in place to analyse user data and consultation findings and use the information to evaluate their current operation and how effectively it is meeting users' needs.

c) The museum should evidence understanding of its users' needs through the forward plan (see requirement 1.4).

Scaled guidance on this requirement, relevant to specific museum types

Independent museums types one and two

The museum should have a process in place to analyse and respond to user and non-user comments in the short and longer term. Activity is undertaken to evaluate user experience of services offered and find out what might be barriers to participation; evaluation results should be used to support development.

Independent museums type three

Evaluation should be comprehensive, including baseline assessment and be able to demonstrate the impact of investment. Evaluation informs planning decisions, focus and future direction as appropriate. Evaluation activity includes a range of analysis tools and types and usually incorporates a mix of quantitative and qualitative approaches; evaluation results support development.

Local authority, university, national and nationally styled museums

Evaluation should be of a broader scope and aspiration, including baseline assessment and be able to demonstrate the impact of investment. Evaluation informs planning decisions, focus and future direction, as appropriate. Evaluation activity includes a range of analysis tools and types and will usually incorporate a mix of quantitative and qualitative approaches; evaluation results support development.

Documentation and information needed	Where it may be found
Information on application/return form	Forward plan
Evidence in forward plan	Audience development plan
	Wider strategic plans

Questions about this requirement that will be considered as part of the assessment

- how does the museum evaluate and analyse collected information and data? How does the museum use the analysis?

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- does the example provided demonstrate how evaluation data is analysed and used?

- is the analysis and evaluation to a sufficient level of detail?
- is evaluation embedded into all activities so user experience can be monitored and outcomes for users reported and understood?
- has the museum identified clear benchmarks to map evaluation against, for example, visitor numbers for different types of visitors in each year, such as families, school groups etc?
- **QIS** How well does the museum or service identify its audience focus or target groups and their needs?

The museum must devise plans to broaden its range of users

General guidance on this requirement, relevant to all museums

a) The museum must use information gathered about its users and non-users, as well as barriers to their participation, to inform the development of plans to broaden the range of users and increase numbers where practical. This should be evident in the forward plan (see 1.4).

b) Broadening the range and number of users might include:

- attracting and engaging targeted new audiences, previously not participating at the museum
- engaging with users from previously under-represented groups to the museum

Scaled guidance on this requirement, relevant to specific museum types

There is no scalability within this section.

Documentation and information needed	Where it may be found
Information on application/return form	Audience development plan
Forward plan	Wider strategic plans

Questions about this requirement that will be considered as part of the assessment

- how does evaluation conducted by the museum inform audience development at the museum and how is this articulated within the forward plan?
- what steps have been made to broaden the museum's current offer or provision to users and non-users?
- does the museum know why some potential audiences are not using the museum?
- how will the museum measure the success of plans to broaden users?
- **QIS** How well does the museum or service understand the barriers to participation and seek to overcome these?

The museum must have a culture of customer care with arrangements in place to make sure all users are treated with courtesy and care

General guidance on this requirement, relevant to all museums

a) The museum demonstrates a commitment to good service provision for all users to the museum. This may be in the form of a visible mission statement or a customer charter that states clearly the standards the museum has set itself in relation to providing good customer service and what the user can expect as a result. It should also provide a mechanism for the user to be able to respond.

b) The museum should evidence a culture of customer care through the forward plan (see requirement 1.4).

c) The museum shares its customer care commitment with the public. The commitment could be on display in the museum, on the website or both.

d) Customer care is promoted as an organisation-wide responsibility. The museum will ensure that all members of the workforce are familiar with the basic principles of quality service provision for all users.

e) The workforce should understand their role in supporting access within the museum. This includes customer care arrangements for disabled users and users with additional needs.

f) The museum has an induction process that includes an introduction to the museum's purpose, facilities and customer care values and approach. Induction processes should apply to the whole workforce including the relevant governing body. For the museum's workforce this may be evidenced through a front of house checklist or annual update training (see requirement 1.7).

Scaled guidance on this requirement, relevant to specific museum types

There is no scalability in this section.

Documentation and information needed	Where it may be found
Information on application or return form	Forward plan Welcome Host scheme or other certification from other recognised customer service bodies Access policy statement VAQAS/VAQAS Cymru/VisitScotland certification Workforce induction documents Customer care policy Complaints procedure 2014 Customer charter / code of practice

Questions about this requirement that will be considered as part of the assessment

- does the museum participate in the VAQAS, VAQAS Cymru, VisitScotland Quality Assurance Scheme, Welcome Host schemes or similar?
- does the museum have a customer charter, customer service code of practice, visible mission statement that outlines a commitment to offer a good service for all users to the museum?

2014

- how is the customer charter/customer service code of practice made available to visitors?

- do the induction arrangements for the workforce include customer care? Are these regularly reviewed?
- is there a clear complaints procedure for visitors to use if an issue cannot be resolved immediately? Is there a plan in place to manage complaints?
- how does the museum ensure that users of the museum are treated with courtesy and care, including contacts through telephone and email from potential visitors who may be considering visiting the museum?
- how does the museum demonstrate workforce awareness of the available facilities and equipment to assist disabled users and users who may have additional needs?
- If the museum has a web presence, does the website provide clear up to date information on opening hours, seasonal events, access information and a telephone number and email address for queries?
- **QIS** How well does the museum or service make provision for those with additional needs?

The museum takes account of users' needs, guided by a policy statement setting out a commitment to give everyone access to collections and associated information

General guidance on this requirement, relevant to all museums

a) The museum must have an access policy statement informed by the access assessment and developed with reference to consultation with users (see requirement 1.4.4 and 3.1.1-3). The access policy statement will state the museum's ethos towards accessibility. It should explain how access is provided and developed and the rationale for the choice of provision.

b) The museum must provide access to its collections and their associated information. The museum should evidence that access issues are being identified and addressed. It should have an up-to-date access assessment (carried out within the last five years or more recently if there has been significant change to buildings or displays).

An access assessment may comprise a number of elements and could include:

- an access audit or an access checklist
- work with focus groups, support agencies, advocacy groups, charities, experts
- facilities checklist
- review of interpretation and collections use

c) The museum should evidence commitment to giving access to collections through the forward plan (see requirement 1.4).

d) The access policy statement should acknowledge that different users have different needs and state the museum's commitment to offer an inclusive service.

e) The statement may acknowledge that access to collections will be balanced against the care and management of collections (see requirement 2.2 and 2.4).

2014

f) Consideration should be given to the use of languages other than English, for example, Braille, British Sign Language, Makaton, Welsh or another language where their use would make the museum, its collections and its offer more accessible to local communities and visitors (see requirements 1.4, 3.1.2 & 3.2.3).

g) Other language options could be provided through a range of methods, examples could include translated hand-outs for certain exhibitions, language specific tours etc. It does not necessarily mean adding additional language text to exhibit labelling

h) Information relating to use of collections based on the museums access policy statement should be evidenced in requirement 3.3.2.

2014

i) Museums should provide appropriate **signed** evidence of approval for the access policy statement which must explicitly state approval has been given. Appropriate evidence may take several forms, such as:

- a signed copy of a full set of minutes
- a signed copy of a redacted set of minutes
- a signed copy of an extract from the minutes that includes the date of the meeting the item number (the extract should include the full item discussion minus any redactions)
- a published (internet) decision document (typically Local Authorities) - these might not actually be signed but publication to be deemed evidence of approval
- a signed but unpublished decision document (typically Local Authorities and universities)

Within Accreditation 'signed' may be defined as any of the following:

- an actual signature from the appropriate individual on a paper document
- a photocopy or scan of a document on which an actual signature exists
- an identifiable email from the appropriate individual with unsigned minutes attached that states that those minutes, or those redacted minutes, or the attached extract from the minutes was approved on a particular date.
- an identifiable email from the appropriate individual that states that the relevant minutes, redacted minutes, or extract from the minutes was approved on a particular date.
- an identifiable email from the appropriate individual that states that the document (plan, policy etc.) has been approved by the governing body.

Scaled guidance on this requirement, relevant to specific museum types

Independent museums

The access assessment should outline where suitable provision has been made, where reasonable and practical, for all users, with particular consideration for disabled users and users with additional needs. The museum should have processes in place to evaluate, monitor, reflect and respond to user needs in relation to its collections and facilities and use this to identify where facilities and services need to be changed in order to meet users' needs. In Wales, it is good practice for third sector organisations to make provision for Welsh language speakers.

Local authority, university and national museums

These museums must comply with the Public Sector Equality Duty[2] and the Equality Act 2010.

The Welsh Language Act 1993 establishes the principle of language equality and notes specific steps to be followed by public bodies such as local authorities, health boards and government agencies – including organisations outside Wales that provide services to people in Wales[3].

[2] www.homeoffice.gov.uk/equalities/equality-act/equality-duty/
[3] www.byig-wlb.org.uk/English/using/Pages/CyngoriGyrffCyhoeddus.aspx

Documentation and information needed	Where it may be found
Information on application or return form	Forward plan
Access policy statement	Collections care and conservation policy
Signed approval	Equalities analysis
	Equal opportunities policy
	Museum website
	2014 Equal opportunities policy

Questions about this requirement that will be considered as part of the assessment

2014
- has the museum conducted an assessment of access needs within the last five years?
- what form did this access assessment take?

- does the museum have a clear access policy statement?
- is that statement widely shared, so users or potential users can find it?
- how is the statement integrated within relevant museum's policy documents?
- how does it guide forward planning?
- does the access policy statement cover physical, intellectual, social, geographical and cultural access?
- how does the museum address the different needs of users and potential users?
- are the induction arrangements for the workforce guided by the access policy statement? Are they regularly reviewed?
- have museums in Wales considered the need to provide information for Welsh language speakers?
- if based in an area of wide cultural diversity, has the museum explored ways of providing exhibit information in additional languages?
- are access details clear on the website?

2014
- if physical access is problematic, what provision does the museum make to ensure access to the collection?

- **QIS** How well does the museum or service encourage and promote access and inclusion?

The museum must respond to tourism and local priorities where appropriate

General guidance on this requirement, relevant to all museums

a) The museum must show that it understands its wider role in the community and its potential to contribute to local priorities.

b) The museum can demonstrate that it proactively seeks opportunities to work with local partners, for example, the local authority, local and tourism partnerships, local forums and specific subject specialist groupings, third sector organisations, local businesses, other cultural organisations such as galleries or theatres, universities, schools, further education providers, hospitals and health partnerships.

c) The museum understands the relevance of local priorities and agendas and has an understanding of how it can link in, support or offer specific services to help deliver (where appropriate), even if the institution is not in an immediate position to contribute. Where smaller museums are embedded within their local and/or specialist communities, the views gathered from local and/or specialist stakeholders to consider activity, partnerships etc is acceptable as evidence. Many museums will be undertaking much of this activity already.

d) The museum has a range of partnerships to draw on specific to identified areas of work or particular projects. To meet the requirement, museums should formalise partnership meetings by taking notes, minutes and opinions for use in developing the forward plan.

e) The museum should evidence commitment to response to tourism and local priorities through the forward plan (see requirement 1.4).

Scaled guidance on this requirement, relevant to specific museum types

There is no scalability in this section.

Documentation and information needed	Where it may be found
Information on application or return form	Forward plan

Questions about this requirement that will be considered as part of the assessment

- does the museum show an awareness of its role in the wider community in the forward plan?
- is the museum outward-facing?
- does the museum evidence partnerships?
- does the museum seek opportunities to work in partnership with others?
- how does the museum work with partners to strengthen its user offer?
- does the museum reference relevant local, regional or national tourism strategies and initiatives in its forward plan?
- has the museum previously received funds through commissioned work or supported locally-commissioned work in association with a range of partners?
- **QIS** How well does the museum forge new partnerships and improve the effectiveness of existing ones?

User focused experience

'The museum must provide a welcoming, accessible environment, and appropriate services and facilities.'

Museums with VAQAS or equivalent certification:

This section can be bypassed if the museum has VAQAS, VAQAS Cymru or VisitScotland Quality Assurance Scheme Certification. Evidence that recommendations are being implemented should be included in the museum's forward and resource plans.

Documentation and information needed	Where it may be found
Information on application or return form	Forward plan
VisitScotland Quality Assurance Scheme report	
VAQAS certification and report	
VAQAS Cymru certification and report	

Questions about this requirement that will be considered as part of the assessment

- is the certification or accreditation document present? Is it current?
- has the museum provided the associated report?
- are any recommendations visible within the forward plan?

2014

Museums without VAQAS or equivalent certification:

The museum must have adequate and accessible facilities to meet the needs of the expected number and range of users or provide information about nearby facilities

General guidance on this requirement, relevant to all museums

a) The museum provides access to an appropriate part of the collection for a minimum of 20 days per year and provides clear information on what is and is not available for the public to access.

b) Where access is restricted, for example, a museum located on an active military base 'behind the wire', access arrangements will be clear.

c) The facilities available at or near to the museum are appropriate for the size of the museum and user numbers and the museum demonstrates an awareness of the current and future levels of users to the museum.

d) Where accessible facilities are not on site, the museum is able to demonstrate that it informs users of the nearest location where they can access these facilities.

e) The museum is able to describe arrangements for the maintenance and cleaning of public areas, to ensure that facilities are adequately maintained.

Scaled guidance on this requirement, relevant to specific museum types

Independent museums, types one and two

The museum will have basic visitor facilities on site and be able to direct visitors to nearby facilities. Seasonal, weekend or special event opening or opening by appointment only.

Independent museums, type three

The museum will have some visitor facilities on site and will be able to direct visitors to nearby facilities. Seasonal or all year opening.

Local authority museums, type one

The museum will have some basic visitor facilities on site and will be able to direct visitors to nearby facilities. Seasonal, weekend or special event opening.

Local authority museums, types two and three

The museum will have some visitor facilities on site and will be able to direct visitors to nearby facilities. Seasonal or all year opening.

University museums, type one

The museum will have basic facilities on site and will be able to direct visitors to nearby facilities. Opening hours should be seasonal, weekend or special event opening or appointment only.

University museums, types two and three

The museum will have some facilities on site and will be able to direct visitors to nearby facilities. Opening hours should be seasonal or open all year.

National museums

Open all year or seasonally as appropriate.

Nationally styled museums

open all year or seasonally as appropriate. The museum must provide evidence demonstrating how the quality of facilities reflects the national name.

Documentation and information needed	Where it may be found
Information on application or return form	Forward plan Access policy statement Access assessment Collections care and conservation plan Museum website

Questions about this requirement that will be considered as part of the assessment

- what are the museum's current opening arrangements? Are they appropriate to the size, nature and location of the museum? In cases where opening arrangements are restricted, what are the restrictions and why do they apply?
- what user facilities are available on site?
- how are users made aware of facilities and how to access them, especially in cases where these are located away from the museum site?
- what maintenance or cleaning schedules for public places are in place at the museum?
- do staff have mechanisms in place to deal with 'on the spot' issues regarding maintenance and cleaning?
- are the museum's cleaning procedures guided by the collection care and conservation policy?
- what maintenance schedules for displays, interactive and other interpretative tools are in place at the museum?

For nationally styled museums:

- how does the museum ensure that the quality of facilities is appropriate to its size and scale?
- how does the museum ensure that the facilities are appropriate, accessible and affordable?
- does the museum benchmark its facilities with other nationally styled and national museums? If so which ones?
- what facilities are available to support researchers (see requirement 3.3.2)?

The museum must have appropriate signs and directions inside and outside the building

General guidance on this requirement, relevant to all museums

a) The museum has external signs to guide users to the venue.

b) There is clear guidance available to help visitors navigate their way around the museum and locate facilities.

Scaled guidance on this requirement, relevant to specific museum types

There is no scalability in this section.

Documentation and information needed	Where it may be found
Information on application or return form	Forward plan Floor plan Museum website

Questions about this requirement that will be considered as part of the assessment

- what external signs are there?
- are these effective?
- what action does the museum take if placing external signs is beyond its direct control?
- how does the museum help visitors to navigate their way round the museum and locate facilities?
- is signage available in languages other than English (where appropriate)?

3.2.3

The museum must communicate effectively with users and potential users through a range of accessible marketing and promotional activities

General guidance on this requirement, relevant to all museums

a) The museum should provide a range of accessible formats for users to access its information as identified through its access policy statement.

b) The museum should publish information about location and how to get there, opening times, facilities and services, including details of current exhibitions and activities, future programming and collections as well as contact details.

c) Information includes provision for disabled users and users with additional access needs.

d) If access to the museum is severely restricted, arrangements for visiting and/or additional opening should be clearly explained.

e) All museums should have a web presence, although this does not mean that all museums need a dedicated website.

f) Where appropriate based on user and non-user evidence, consideration should be given to the use of languages other than English.

Scaled guidance on this requirement, relevant to specific museum types

Independent and university museums, type one

The museum has a variety of marketing and promotional activities relevant for its users.

Independent and university, types two and three, local authority, national and nationally styled

Marketing is targeted towards relevant user groups. There is evidence of joint marketing with other venues and attractions in the area.

Documentation and information needed	Where it may be found
Information on application or return form	Forward plan Leaflets, website, posters, guidebooks Marketing plan

Questions about this requirement that will be considered as part of the assessment

- what promotional and marketing material is available?
- does the published information cover the requirements listed above?
- is promotional/marketing material available in accessible formats?
- does the museum's website meet standard accessibility formats?
- will marketing or promotional material reach users and potential users in terms of content and medium used?

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- is the website kept up to date?
- in cases where restrictions are in place what alternative arrangements have been made on site so that users can access the museum's collections?
- has the use of languages other than English been considered?
- does the museum have a public phone number that is staffed or an email address for specific queries a visitor may have?
- **QIS** How well is the museum or service marketed?

Requirement 3.3

Effective and engaging learning experiences

‘Learning is a core purpose for Accredited museums. They use collections and associated information for exhibitions and learning opportunities.’

3.3.1

The museum must exhibit the collections using a variety of interpretative methods

General guidance on this requirement, relevant to all museums

a) The museum utilises at least two approaches to interpretation, for example, chronological, social, dramatic, technological, cultural, environmental, scientific, thematic, live, etc.

b) The museum has a range of materials, tools and activities to engage users with the collections and communicate collections information. Interpretation tools and materials might include:

- appropriate labels and panels
- printed guides and catalogues
- oral recordings, films, sound archives
- guided tours
- live interpretation
- interactives
- audio guides
- backpacks
- information maps
- quizzes
- treasure hunts
- checklists
- spotter guides
- museum quest activities
- dressing up
- digital applications
- handling collections
- online resources
- special events

c) Interpretative approaches are relevant to and inclusive of users to the museum and are linked into the wider planning of the museum, informed through consultation (see requirement 3.1.1, 3.1.3, 1.4). The museum should evidence commitment through the forward plan (see requirement 1.4).

d) The museum takes advice on collections information and research from an expert to inform interpretative approaches, if no workforce member has experience in this area.

Scaled guidance on this requirement, relevant to specific museum types

National and nationally styled museums

The museum demonstrates multiple approaches to interpretation of the collection. The museum's display policy or similar must reflect the full range of its collections and justify the use of the word 'national' or equivalent. The museum may have substantial collections but insufficient space to display a representative selection of its holdings in exhibitions. The museum must provide evidence of access to collections held in store, for example, visits by appointment.

Documentation and information needed	Where it may be found
Information on application/return form	Forward plan Interpretation plan Learning plan Relevant section in museum's forward plan Access policy statement Access assessment Display policy Activity plan

Questions about this requirement that will be considered as part of the assessment

- is the museum's interpretation of the collection appropriately diverse?
- is there an appropriate fit between the interpretative methods used and the users they seek to reach?
- have alternative methods of interpretation been considered in order to attract current non-users, for example, when considering regimental museums how might audiences be attracted to visit who do not have a connection to that regiment?
- what materials, tools and activities does the museum use to engage users with the collections and communicate collections information?
- **QIS** How well does the interpretation invite and stimulate learning?

The museum provides access to the collections and associated information for research purposes and other forms of engagement

General guidance on this requirement, relevant to all museums

a) The museum supports research into the collections it holds.

b) The museum provides information on what is and is not available for public access and provides users with access to its collections, both on display and in store, and associated information. The museum does this in a variety of ways that may include:

- guided tours, including stores
- facilitated school or group sessions
- promotional events
- identification sessions
- catalogues
- website/online collections access
- research facilities and materials

c) The museum has a planned approach to widening access to its collections, facilitating wider access to a collection may include implementation of:

- increasing access to stores
- loans to other organisations
- handling collections
- development of online resources
- temporary exhibitions
- learning resources, outreach, loans services
- collection tours

d) The museum takes advice on collections information and research from an expert.

e) The museum should evidence commitment through the forward plan (see requirement 1.4).

Scaled guidance on this requirement, relevant to specific museum types

Independent museums, type one

Provides access to its collection where possible and provides clear information on what is and is not available for public access. There is a procedure in place to handle research enquiries.

Independent, types two and three, local authority and university museums

Provides access to its collection, providing clear information on what is and is not available for public access. Research materials and facilities are available, and the results of research are published

National museums

The museum recognises its obligation to the museum community as a whole, particularly in its role providing specialist advice to other museums working in similar fields. The museum recognises its obligation to national and international scholarship by providing adequate staffing levels and expertise to support research of the collections. This may include: academic, general interest, scholarly, local history etc. Facilitating wider research to the collection may include implementation of a number of facilities including: a reading room, library facility or research area, online access or direct access to museum archive, study room or separate study area, mail order service, academic publications and research papers, online enquiry service, academic support including curatorial expertise (see b above).

Nationally styled museums

A museum using the term national must recognise its obligation to the museum community as a whole, particularly its role in providing specialist, professional and authoritative expertise and advice to other museums working in the same or similar fields. It must recognise its obligation to national and international scholarship by providing adequate staffing levels and accommodation to deal with such enquiries and by actively publishing scholarly works. Evidence must be provided demonstrating the provision of study and research facilities for academic and public use.

Documentation and information needed	Where it may be found
Information on application or return form	Forward plan
Evidence on forward plan	Collection management plan
	Collections care and conservation plan
	Access policy statement
	Interpretation plan
	Display policy
	List of publications
	Activity plan
	Museum website

Questions about this requirement that will be considered as part of the assessment

- what percentage of the museum's permanent collection is on display?
- how are users able to access collections in store?
- what does this look like or comprise?
- what is the museum's current outreach offer?
- how does the museum facilitate collections research?
    - does the museum plan to improve/development access for research?

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- is there an online presence, such as online exhibitions or collections database?
- **QIS** How well does the museum support and promote research into the collections and ensure it is disseminated?
- **QIS** How well has the museum improved its collection documentation in order to improve public access and knowledge?

For nationally styled museums:

- how does the museum support other museums working in similar fields?
- what research does the museum undertake/has the museum undertaken?
- what staffing arrangements are in place to support research at the museum?
- what is the nature of the research support and faculties provided?

The museum provides effective and stimulating learning and discovery experiences focused on the collections

General guidance on this requirement, relevant to all museums

a) The museum has a clear understanding of the role of learning within the organisation for its users and potential users. Learning is a shared priority and is understood by all members of the workforce.

b) The museum promotes itself as a place to learn and be inspired, reflected throughout the organisation and guided by forward planning.

c) The museum is able to support learning in a variety of ways, for example, providing talks and lectures, guiding and facilitating groups, leading taught sessions, producing publications and learning resources

d) The museum provides a welcoming and stimulating learning environment for its users. Learning opportunities are relevant to the museum's focus and its collections with a range of engaging learning experiences on offer appropriate to the levels, ages and abilities of users. Learning styles may be taken into account when designing engaging learning experiences, for example, visual (learning through seeing); auditory (learning through listening and discussing); tactile/kinaesthetic (learning through doing, touching, moving), see requirement 3.1.1.

e) The museum has effective partnerships in place to facilitate effective learning experiences. Partnerships may include work with: local authorities; universities; third sector organisations (charities); religious organisations; membership organisations; schools and teachers; sure start centres; adult learning colleges and further education providers. National as well as other partnerships such as: specialist interest groups; peer support from other museums and other cultural organisations within different sectors (theatres, galleries, archives, libraries etc.); local groups; teacher groups; youth workers; project groups (local authorities specific working groups on issues relevant to locality, for example, through commissioning groups).

f) The museum should evidence commitment through the forward plan (see requirement 1.4).

Scaled guidance on this requirement, relevant to specific museum types

Independent museums, type one

Learning groups are welcomed on site; the museum supports subject specialist lectures or talks. Groups may be self-directed or led through museum tours. Talks and lectures will be offered at the museum throughout the year. There will be self-led learning opportunities at the museum. Partnerships will be present to support learning. On a basic level this might be a link with a local school or school cluster or links with local community groups.

Independent museums, type two

Learning groups are welcomed on site; the museum supports subject specialist lectures and talks and has a formal learning programme. There will be self-led learning opportunities at the museum. There will be materials to support formal learning groups at the museum. Partnerships will be present to support learning. On a basic level this might be a link with a local school or school cluster or link with local community groups but may also include links with local colleges, further education providers and universities as well as other partnerships as appropriate.

Independent museums, type three

Learning groups are welcomed on site, the museum supports subject specialist lectures and talks and has a formal learning offer for multiple educational and user groups (incorporating informal learning). Evidence of a wide range of learning opportunities for different user groups incorporating different learning styles. Partnerships to support learning will be sophisticated in their reach and relevant to the variety of learning offers at the museum. Information to facilitate visits should be available to group leaders.

Local authority museums, type one

Learning groups are welcomed on site; the museum supports subject specialist lectures and talks and has a formal learning offer. There will be some partnerships evidenced to support learning. On a basic level this might be a link with a local school or school cluster or link with local community groups but may also include links with local colleges, further education providers and universities as well as other partnerships.

Local authority museums, types two and three

Learning groups are welcomed on site, the museum supports subject specialist lectures and talks and has a formal learning offer for multiple educational and user groups (incorporating informal learning). Evidence of a wide range of learning opportunities for different user groups incorporating different learning styles. Partnerships to support learning will be sophisticated in their reach and relevant to the variety of learning offers at the museum. Information to facilitate visits should be available to group leaders.

University museums, type one

Formal learning offer within the university, regular subject specialist lectures and talks that are external to the university users. The museum will have partnerships in place with various university academic schools and departments. Evidence of partnerships outside of the university. On a basic level this might be a link with a local school or school cluster, link with local community groups or subject specialist groups.

University museums, types two and three

Formal learning offer within the university, regular subject specialist lectures and talks and publications. Learning offer to other user groups in addition to university users. Evidence of a wide range of learning opportunities for different user groups incorporating different learning styles. Learning is supported at the museum across the museum's workforce. There will be at least one paid member of staff with responsibility for learning. This could be a shared post. Learning staff are represented within senior management teams. Relevant workforce members receive regular training and induction features learning at the museum. Partnerships in place with various university academic schools and departments. Partnerships to support learning are sophisticated in their reach and relevant to the variety of learning offers at the museum. Information to facilitate visits should be available to group leaders.

National and nationally styled museums

Regular temporary exhibitions, formal learning offers to multiple educational and user groups, regular subject specialist and expert lectures and talks and publications. Learning groups are welcomed on site. Evidence of a wide range of learning opportunities for different user groups incorporating different learning styles. Learning is supported at the museum across the museum's workforce. There will be a number of learning staff at the museum. Learning staff are represented within senior management and project teams. Relevant workforce members receive regular training and induction features supporting learning at the museum. Partnerships to support learning are sophisticated in their reach and relevant to the variety of learning offers at the museum. Information to facilitate visits should be available to group leaders.

Documentation and information needed	Where it may be found
Information on application and return form	Forward plan Learning plan Statement of purpose Resource plan Museum website

Questions about this requirement that will be considered as part of the assessment

- is the museum's workforce aware of their role in supporting learning?
- is there a workforce member responsible for learning within the museum? If there is not a dedicated staff member, how is learning supported by the museum?
- do the learning activities reflect the museum's purpose and collection?
- do these learning activities link back to the focus of the museum and its collections?
- are learning opportunities offered appropriate to the size and nature of the collections?
- how are learning experiences at the museum appropriate for the ranges of users to the museum?
- do the learning activities and resources reflective of different learning styles?
- does the museum engage and consult with a broad range of people to develop learning opportunities?
- how are learning opportunities promoted?
- what information is made available to groups, particularly of children and vulnerable adults, to facilitate their visit?
- **QIS** How well does the museum create opportunities for learning through partnerships?