

## Scope of Requirements

### Introduction

Arts Council requires support with the assessment of Museums Accreditation Returns.

Accreditation is the UK standard for museums and galleries. It was set up in 1988 at the request of the museum sector. It is delivered across the UK via an agreed partnership of ACE; Museums Galleries Scotland; the Welsh Government and the Northern Ireland Museums Council. The credibility of the Scheme, both within the UK and internationally, comes from the high level of voluntary participation with around 1700 museums currently participating. Accreditation is widely credited with playing an important role in raising standards in museums since its introduction. As an agreed standard with a badged award, Accreditation is understood within the sector, but also by relevant funding bodies and governing bodies, as the mark of a decent museum, worthy of support. Accreditation has an emphasis on effective forward planning to build relevance and resilience.

The aims of the Accreditation Scheme are to:

- encourage all museums and galleries to achieve agreed standards in:
  - how they are run
  - how they manage their collections; and
  - the experiences of users
- to encourage public confidence in museums as organisations that manage collections for the benefit of society and manage public funds appropriately.
- to reinforce a shared ethical and professional basis for all involved in governing and working in museums, and to ensure that museums meet all relevant legal and ethical requirements.

### Purpose/Objectives

Museums participating in the Accreditation Scheme are invited to demonstrate their maintenance of the Standard once every three years. Accreditation returns are triennial compliance reports that support museums participating within the Accreditation Scheme to demonstrate their compliance with the UK national standard for museums.

To effectively deliver assessments of Accreditation returns, we are seeking to establish a framework of experienced service providers. Contract assessors will assess the compliance of non-national museums in England against the UK Accreditation Standard by reviewing submissions and preparing recommendations and written reports to support decision making by the Accreditation Panel.

### Current status

Ordinarily applicants should expect a response to their application within 5 months, from return date to confirmation of award. However due to unforeseen circumstances processing time has taken longer than usual and at time of publication we have an immediate requirement to clear a backlog of approximately 250 return applications.

## Requirements

### Assessment activity

Contract assessors will be required to:

- attend a one half day training workshop at the Arts Council offices in Birmingham.
- undertake assessment of Accreditation returns.
- assess by reviewing the return forms and all relevant supporting documents including those from previous returns where relevant. Some information will be sourced by the assessor from other sources such as the Arts Council, The Charities Commission website and the applicant's own website.
- liaise with participating applicants, providing feedback and requesting additional information. This may include requests for clarification, and seeking additional information and updated documents for missing or incomplete returns.
- prepare recommendations and written reports to support award decision-making by the Accreditation panel.
- submit completed assessments for moderation and quality assurance to a senior member of the Accreditation team (moderator). This may involve additional queries and workbook editing before they are confirmed for the next appropriate Panel agenda. Where assessors recommend Provisional Accreditation, discussions around the rationale behind the recommendation may need to take place with the moderator.
- submit additional or updated documents from the applicant and compiled copies of key assessment correspondence to support the moderation stage.
- liaise with external stakeholders as appropriate (regional museum development teams/Accreditation advisors, museum mentors, ACE Relationship Managers and ACE Designation Manager) in order to develop the assessment and the draft recommendation.
- communicate draft recommendations to applicants once the workbook is approved by the moderator and scheduled to an appropriate Accreditation panel the assessor. This should be done as far in advance of the Panel meeting as is practicable, allowing sufficient time for the applicant to comment should they wish to.
- prepare draft award outcome letters based on a supplied template, to be submitted to ACE by a deadline of one week following the Panel meeting.
- participate in a meeting (in person or by telephone) at the end of the framework agreement to evaluate performance and as an opportunity for mutual feedback.

Contract assessors will not be required to:

- attend Panel meetings, cases will be presented by a senior member of the Accreditation team on behalf of the assessor.
- visit museums under assessment as part of this contract.

Assessments take on average seven hours, typically in several blocks of time including an initial assessment and response with queries to the museum, and then a subsequent review of the museum's response and any additional information provided. Assessors will also need to consider the quality assurance process which may result in some additional queries from the moderator. In some cases assessment will be of a group of museums in a service in which case the primary activity will be to assess the 'service-wide' information once, followed by assessments of the site elements for each museum. In these circumstances individual assessments typically take a shorter amount of time than the average seven hours. A senior member of the Accreditation team will be available throughout the Framework to support assessment activity. Please refer to Appendix 1 of this document for a more detailed overview of the assessment workflow.

Arts Council England expects that each contract assessor appointed to the Framework will be able to complete a *minimum of 10 assessments*. The assessments will be given to the contract assessor appointed to the Framework in accordance with the allocation of assessment process set out below.

#### Skills, expertise and knowledge

Contract assessors will be required to demonstrate museum professional skills and experience exceeding those stated within requirement 1.8 of the Accreditation Standard which defines the term 'museum professional' as someone with:

- a minimum of five years' experience working in museums, with recent experience at curator/manager level. At least three years should be in an area of competence relating to Accreditation - organisational health, collections, or users and their experiences
- a relevant or linked qualification
- a commitment to career-long continuing professional development (CPD).

Contract assessors will also be required to demonstrate:

- capacity to complete a *minimum 10 assessments* during the Framework period as stated above.
- indicate the maximum number of assessment you will be able to conduct during the Framework term.
- a good knowledge of the 2011 Museum Accreditation Standard and the process of assessment.
- awareness of governance and management structures in the cultural sector.
- awareness of collections management and museum practice gained through experience of working in museums.
- a basic understanding of financial data.
- excellent interpersonal, negotiation skills and planning skills and have experience of critically analysing business information, identifying challenges and opportunities and making effective judgements.
- organisational skills to effectively prioritise and plan caseload and demonstrating good time management skills and delivering against commitments.
- ability to work under pressure and proven record of meeting deadlines.
- able to choose the appropriate form of communication for a situation and consult appropriately.
- excellent customer care skills.
- excellent written communication skills and report writing skills.

Contract assessors appointed to the Framework must be able to meet the following requirements:

- security of data as all materials provided will be covered by the Arts Council's information security policy with which the service provider must comply. A non-disclosure agreement will need to be signed prior to undertaking assessment work.
- compliance with the Arts Council's legal obligations regarding equality and diversity under the Equality Act 2010 (the public sector equality duty).
- declare Conflicts and Declarations of Interest in line with Arts Council policy and guidance notes.
- provision of all services and required equipment and materials to be able to deliver services under the Framework.

- effective representation of Arts Council England when liaising with internal and external stakeholders. Ensure maintenance of knowledge of current Arts Council England priorities and relevant initiatives and demonstrate the values of the organisation.

### **Allocation of assessment work**

Assessment work will be allocated under the framework agreement taking into account the following factors: (1) price, (2) capacity & performance and (3) conflicts of interest.

### **Scope of service**

The service is required on a national basis, although as the work can be carried out remotely without the use of any special equipment it is anticipated that the adviser would not be required to travel.

### **Service Levels**

Accreditation return applications must be assessed in order of submission date, thereby prioritising those who submitted the earliest. Any assigned Accreditation returns that have not been assessed should be returned to the senior member of the Accreditation team with an explanation as to why they remain outstanding.

### **Escalation Procedures**

In the event of a major problem, a list of contacts will be required to manage any problem to a successful conclusion.

### **Account Management**

In performing the services required under this contract the supplier will report to Isabel Wilson (Senior Manager, Collections and Museum Programmes) based in the Birmingham Office or their nominated individual. Please specify in your proposal the named individual who will be responsible for the account management of this contract on behalf of your organisation.

## Appendix 1

### Assessment workflow

The Accreditation team in England sits within the Collections and Cultural Property team, part of the Arts and Culture Department at Arts Council's office in Birmingham.

#### Accreditation returns received via online portal and acknowledged by ACE

▼  
Documents saved by Assistant to museum's applicant file

#### Assessor begins assessment.

Reviewing the return form and all relevant supporting documents including those from previous returns.

▼  
Assessor sends email to applicant introducing themselves and confirming that the Accreditation return is being reviewed.

▼  
Initial checklist and application form run-through completed.

▼  
Assessor sends follow-up email to request additional information, missing documentation and seek clarification. Ordinarily a 2 week deadline is given, with the option to extend this if additional time is required by the applicant.

▼  
The introductory and follow-up email should be addressed to the primary contact person and should copy in the senior contact person, Museum Mentor (if applicable), Museum Development Officer, Accreditation Adviser (if applicable) and ACE Relationship Manager.

▼  
Assessors to visit 10% of applicants as part of the assessment process, not including new applications  
(Contract assessors are not required to undertake verification visits)

▼  
Support & advice available from a senior member of the Accreditation team.

#### Additional documentation and/or information received from applicant and reviewed by the assessor.

#### Full assessment undertaken.

▼  
Recommendation for panel clearly indicated. Recommendations can be Full Accreditation, Provisional Accreditation (3, 6, 9 or 12 months) Remove, Remove and exclude (deliberate non-compliance).

▼  
Workbook to provide relevant information leading to an appropriate decision by Accreditation Panel members. Information arranged under headings:

- Recommendation
  - Required actions & Areas for improvement
  - Assessor's view – application analysis
    - Current activity – brief description
- Previous required actions & areas for improvement
  - The applicant – history/overview
  - Assessment Summary Sheet

**Complete assessment sent to Senior Member of Accreditation team for moderation  
(quality assurance check)**

The senior member may request:

- additional documents and/or information
- changes to the workbook/summary sheet
- revision of Areas for Improvement or Required Actions
- to defer the assessment to the next appropriate meeting owing to incomplete information



**Assessment approved.**

Draft recommendation and draft required actions and/or areas for improvement to be emailed to all recipients (as per the introductory and follow-up email).



**Assessor presents assessment to Panel**

*(contract assessors will not be required to attend Panel)*



**Award effective date.**

The decisions of the Panel are effective from the date of publication of the official statistics, normally two weeks after panel. The award official statistics dates/ decision effective dates are published on the DCMS and Arts Council England websites.



**Assessor prepare and send out award outcome letters.**