



Uttlesford District Council

Chief Executive: John Mitchell

Museum Management Working Group

Date: Wednesday, 22 July 2015

Time: 18:00

Venue: Shirehill Store

Address: **Museum Store** at Shirehill, Uttlesford District Council Street Services Depot, Shirehill, Saffron Walden, Essex CB11 3AN

Members: Councillors R Chambers, B Light, G Sell and L Wells (Uttlesford District Council) D Laing, R Priestley, P Salvidge and A Watson (Museum Society Limited).

AGENDA

- 1 Election of Chairman
- 2 Apologies for absence and declarations of interest.
- 3 Minutes of the meeting held on 18 March 2015 5 - 8
- 4 Matters Arising
- 5 Chairman's Report 9 - 10
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9	Forward Plan 2013	63 - 100
10	Any other items which the Chairman considers to be urgent	
11	Date of next meeting	

For information about this meeting please contact Democratic Services

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MUSEUM MANAGEMENT WORKING GROUP held at SAFFRON WALDEN MUSEUM at 6pm on 18 MARCH 2015

Present: Mr A Watson (Chairman)
Councillor V Ranger (Uttlesford Member)
Mr R Priestley and Mr P Salvidge (Museum Society Limited).

Officers in attendance: R Auty (Assistant Director Corporate Services), A Rees (Democratic and Electoral Services Officer), A Webb (Director of Finance and Corporate Services) and C Wingfield (Curator).

MM28 APOLOGIES FOR ABSENCE

Apologies for absence were received from Councillors Eden and Morson.

In the absence of Councillor Eden, Mr Watson was elected as Chairman for the meeting.

MM29 MINUTES OF THE PREVIOUS MEETING

The Chairman signed the minutes as a correct record.

MM30 CHAIRMAN'S REPORT

Mr Watson said most of the Report was going to be discussed later in the meeting. The Society had agreed to provide a grant to the Museum so it could continue to employ Hayley Wilson as a casual administrative assistant.

MM31 MUSEUM QUARTERLY REPORT

The Curator said most of the Report would be explained under subsequent items. She highlighted the key remaining points of the Report. It had been a relatively quiet quarter in terms of visitors because there had been no special exhibitions. Income from the shop had continued to increase. There had been more talks held at the Museum, but they had generally been smaller and more bespoke.

Responding to a question by Mr Watson, the Curator said it was too early to know whether Monday closures had affected visitor figures.

MM32 ACCREDITATION UPDATE

The Curator informed Members that the Museum was now fully accredited by the Arts Council, meaning it was now in a stronger position to apply for grants.

Members thanked the Curator and Mr Watson for their work on the accreditation submission.

MM33 SHIREHILL STORE UPDATE

Members received an update about the store at Shirehill from the Assistant Director Corporate Services. He said although the contractor's (Link 51) progress had been slow, there was still a lot of work for the volunteers to do.

The Curator said a carpenter had looked at the peg board and was liaising with Link 51 about the next steps.

The Museum would have two interns. A £1,000 grant had been made available to cover their travel expenses. Primarily they would be following the Curator and Liah Mellors.

The Director of Finance and Corporate Services said a report recommending the allocation of £150,000 to install photovoltaic cells on the buildings at the Shirehill depot was due to go to Cabinet on 19 March 2015. Security cameras were going to be installed to cover existing blind spots.

MM34 CERAMICS GALLERY UPDATE

The Curator updated Members on the ceramics gallery. She had met with the Curator of Collections for English Heritage about moving the painting in the Gallery to Audley End House. From initial discussions it seemed English Heritage were interested in taking the painting. Another meeting was scheduled for 7 April.

MM35 MUSEUM WEBSITE UPDATE

Members were told by the Assistant Director Corporate Services that the website was now live, although currently it was only accessible through the Council's website. This issue was going to be resolved shortly.

Members thanked Tony Morton and officers for their work on the website.

MM36 SHARE FUND-RAISING COHORT

The Curator said both she and Mr Priestley would be attending a number of SHARE courses which would help with the development of fund-raising strategies for the Museum.

MM37 MUSEUM EVENTS

The Curator explained there were a number of events that had either been organised, or were being organised, throughout 2015 and 2016.

In 2015, on 30 May, there was going to be a re-enactment at the Museum to commemorate the 200th anniversary of the Battle of Waterloo. The following day there was going to be a regional junior triathlon event at the Friends School, which would be using the Museum's lion Wallace as its mascot. The Museum was planning on offering free entry to the families of children who were competing in the triathlon.

In June the Museum would be hosting Saffron Walden Nursery's Summer Fete. Gemma Tulley had begun organising a special collections exhibition due to start on 29 August. The exhibition would be comprised of collections submitted by the public. There had been a good response so far, meaning the exhibition was likely to showcase a diverse range of collections.

The Museum had been approached about hosting a family music event in July 2016, which was previously hosted at The Fighting Cocks pub. The organisers were experienced and had already submitted an event plan.

The Curator said 2016 would also mark the millennial anniversary of the Battle of Assandun. Initial meetings with the parish councils of Hadstock and Ashdon had already taken place. She was going to meet with Ashdon Primary School on 19 March to discuss what the school would like to do in order to commemorate the anniversary.

MM38

DATE OF NEXT MEETING

It was provisionally agreed the date of the next meeting would be 22 July. The possibility of holding the meeting at the new store at Shirehill would be explored.

The meeting ended at 6.35pm.

**Museum Management Working Group
Meeting 22nd July 2015
Museum Society Chairman's Report**

The Board have postponed the date of the Annual General Meeting to the 25th September 2015. This follows the resignation of the Treasurer Andrew Penman owing to a change in his personal circumstances. David Laing has agreed to return as a temporary Treasurer, but needed more time to complete the preparation of the annual accounts and have these examined. The Board are most grateful for David coming to help out until such time as we can find a new Treasurer. We await formal confirmation that Barbara Light has been appointed to the Board of Directors to replace Keith Eden. The Board thanked Keith Eden for his support during his time as a Director at its last meeting.

Work on the New Store shelving is at last complete. Work proceeds with the packing at Newport and work continues in the new store in anticipation of the move in the next couple of months. By the time of the AGM all should be complete and we hope to have a viewing for members in the autumn. The Board appointed a new Committee to consider the future development of the Museum, now that the planning for the new store and the transfer of contents is complete. The new Development Committee has met twice and is making progress in setting up the framework for the plans for the re-development of the Museum Buildings. The Committee spent some time visiting all the back rooms of the Museum and looking at the proposed site. We hope to have a Design Brief to consider at our next meeting.

Both the Society Website and the Museum Website have been re-launched. Tony Morton, a member of the Support Committee, has made an excellent job of bringing both these sites up to date. If you have not yet visited these do have a look, there is now up to date information of the Societies affairs and the Museum site is full of interesting information. As a result of suggestions made by the Support Committee the Donation Box has been moved to a more prominent position in the entrance hall. Try flushing your money to hear the audible thank you!

The main event of the spring has been the Waterloo event which went with a big bang! 30th May began with the volunteers erecting the array of tents and the arrival of a detachment of British Soldiers. Their demonstrations of the one shot muskets used at the time of Waterloo were well supported. It was also possible to fight a virtual battle on laptops. The pop up tea room and the bookstall were well supported and resulted in funds for the Society.

The spring series of talks is now complete and two outings have just been published by Carol Law and Heather Salvidge. A visit to the Polar Museum and Fingringhoe Wick and will have taken place by the time of this meeting.

Tony Watson.

SAFFRON WALDEN MUSEUM

CURATOR'S QUARTERLY REPORT

April – June 2015

1 Museum Management and Staff

1.1 Management

Forward Plan 2013-2018 and Shirehill Store

The installation of mobile and static racking by Link51 has been completed except for a few minor 'snagging' items and collection of surplus shelving. Cocksedge are pursuing these and also repairing some minor damage caused by Link51. A number of other items now need to be completed in July, chiefly the installation of a dehumidifier in the natural history store, a deep clean and advisory visit of the Council's Health & Safety Officer, before the moving-in of collections can commence.

Meanwhile packing and sorting of collections continues with curatorial staff and the team of store volunteers, ably supported by Hayley Wilson (Casual Administrative Assistant, funded by the Museum Society). Most of this work has been completed, although the last phase of assessment and packing will be possible only when other collections have been moved out, liberating space and access in congested storage areas.

Internships

In April, a new internship programme, managed by Leah Mellors (Collections Officer, Human History) commenced. Nicola Lawson (social history) and Dorian Knight (archaeology) started on 13 April and have completed 30 days each. Nicola carried out an audit of part of the social history collection, documenting the collection on our database and re-packing the collections with appropriate materials. Dorian helped to assess some of the archaeology collections for rationalisation, researching their provenance and repacking them. Both of these projects will contribute to the store move by helping us to assess and potentially rationalise the collections, which will help with storage issues.

1.2 Staff

Hayley Wilson's contract as casual Admin Assistant (12 hrs per week) has been extended until 30 September, thanks to support from the Museum Society. U-Perform appraisal interviews took place with Museum staff.

1.3 Volunteers and Work Experience

Special roadside verge surveyors reported back to Natural Sciences Officer on the April cut and are carrying out the 2015 programme of ecological surveys.

Store Team volunteers packed collections for approximately 600 hours.

The team of Human History Collections Volunteers have continued their work on the documentation of the collections. Together, they contribute 160 hours of their time over the quarter. They are mostly working on the 2D collection of documents and photographs.

Joseph Cladingboel took part in a one week placement with the Visitor Services and Learning Officer as part of training in learning outside the classroom, a module of his PGCE (teaching qualification), London Southbank University, approximately 25 hours.

1.4 Training and Seminars Attended

15 April	SHARE Fund-raising cohort, meeting at Chelmsford (CW, Richard Priestley)
27 April	Study visit to 'Magnificent Obsessions' exhibition at the Barbican, London (GT, LM)
On-going	Behind the Scenes of a 21 st Century Museum, online course (LM)
8 May	AMA Support Group, Norwich (LM)
26 May	Dementia Friends (Uttlesford District Council) (HW)
27 May	SHARE Natural History Curators' Network meeting, Southend on Sea (SK)
28 May	Developing Skills for Collections Management, NHM, London (LM)
1 June	Casuals training (In-house, Museum) (all Museum Casual staff)
8 June	Digital museums training – Essex County Council, Colchester (GT)
18 June	SHARE Fund-raising cohort, meeting in Museum with adviser (CW, Richard Priestley)
18 June	Fire and Security Systems training (all Museum staff by SS)
29 June	SHARE Collaboration Cohort (at Museum in school room) (LM, HW)

1.5 Health & Safety

No specific items to report this quarter.

2 Buildings and Site

2.1 Museum Building

Saffron Security serviced alarms. Pest monitoring took place in stores and galleries. Emergency repairs were undertaken by UDC Housing Repairs of the Accessible WC. Servicing and inspections took place for: hand driers; lift and stair lifts. IT Security Officer Wayne Caton and an external contractor have been working on installation of the new broadband (completed on 10 July).

2.2 Laboratory/Schoolroom

Saffron Security serviced alarms. Pest monitoring took place in the store.

2.3 Newport Store

Due to a false alarm call-out last November, Essex Police will no longer automatically attend out-of-hours call-outs at this store, unless the intruder alarm system is upgraded. Due to the cost and imminent evacuation of the Newport store, the current basic system has not been retained, and Police and UDC Contract Services (who will be taking over the store) have been notified. (Two staff always attend all call-outs, and if they found anything suspicious, staff would call the Police).

2.4 Grounds and Castle Site

A gate pillar at entrance on Museum Street was demolished by a delivery lorry, and the insurance claim is in progress. Rebuilding will need approval from the Planning Conservation Office and Historic England (Conservation Area and Scheduled Ancient Monument conditions).

Frost cover was removed from the cracked glacial erratic boulder in the grounds.

Work by contractors for UDC Planning continues on the castle walls and walls around the grounds.

3 Collections and Research

3.1 Acquisitions and Disposals

12 acquisitions entered in the register this quarter, including:

- Commemorative bronze coin, designed for Edward VII's coronation
- Archaeological evaluations from Elsenham, Great Easton, Little Canfield and Little Bardfield (finds and records to be deposited by archaeological contractors at a later date)
- A hoard of four gold Gallo-Belgic coins, purchased through the Treasure Act 1996
- Early medieval (Viking) silver ingot, purchased through the Treasure Act 1996
- The lower part of a Roman skeleton found in Saffron Walden on the former Tudor Works site, Debden Road, from Essex Police

3.2 Collections Care and Conservation

New moth traps were placed in the ethnography and costume galleries, following concerns about pest management in these galleries.

3.3 Documentation

1 new acquisition catalogued this quarter.

Backlog / updates are as follows:

	New Acquisitions	Backlog (existing collections not previously catalogued on Modes)	Edits and Updates to existing records
Human history colln.s	1	1386	3408
Natural history colln.s	0	1	1098
Total	1	1387	4506

Effective Collections (World Cultures project)

Quotations and advice are being sought to see how much of the website design brief can be achieved within the project budget.

3.4 Loans In

A collection of model aeroplanes, featuring most types of plane to fly from Debden airfield, has been loaned to us by Ruth Braybrooke for the upcoming *Uttlesford: A Community of Collectors* exhibition (Aug 2015 – Feb 2016)

The Green Howards Museum in North Yorkshire has requested the return of several Zulu items loaned to the Museum in the 1980s. The Collections Officer (Human History) is arranging their return.

3.5 Loans Out

There have been no loans out during this period.

3.6 Object Identification and Enquiries

Object identifications this quarter: **0 (service suspended)**

Collection Enquiries this quarter: **38** (visitors' 'on-the-spot' ad urgent / essential enquiries only)

Collections and research enquiries, and identification services are temporarily suspended until further notice while staff time has to be prioritised for packing and moving collections.

3.7 Research

2 people from Haverhill Historical Society researching William Wakeling Boreham, whose widow

donated Anglo-Saxon artefacts from a seventh-century burial at Coombe in Kent.

4 Displays and Visitor Services

4.1 Permanent Galleries

A new 'Object of the Month' programme has been started by Leah Mellors, Collections Officer (Human History) as a way of sharing objects that are rarely seen on display. A case of relics, including a lock of Napoleon's hair, was displayed in May and a braille slate was displayed in June. Each month, a new object will be chosen by a member of staff, intern or volunteer and displayed in one of the permanent galleries, as well as being shared on our blog and on social media.

4.2 Temporary Exhibitions

Work is progressing on our next exhibition, *Uttlesford: A Community of Collectors*, which will explore the collections of ordinary people in our local community. Gemma Tully (Visitor Services & Learning Officer) and Leah Mellors (Collections Officer, Human History) have held three workshops with participants to teach them how to care for, display and interpret their collections. Most of the participants will be heavily involved in writing their own exhibition text and creating their own displays. Leah will prepare a display in the exhibition relating to one of the early collectors of the museum. The exhibition will open on 29 August 2015.

4.3 Visitor Services

	Public		Schools incl. adults		Total	
	2015	2014	2015	2014	2015	2014
April	1203	1490	186	73	1389	1563
May	1607	1244	104	252	1711	1496
June	1394	524	431	299	1825	841
Total	4204	3258	721	624	4925	3900

Easter weekend 3-6 April 2015 (18-21 April 2014)

Tickets

	2015	2014
April	£ 803.25	952.60
May	£ 881.50	884.50
June	£458.25	394.50
Total £	2143.00	2231.60

Donations

	2015	2014
April	£ 83.84	106.79
May	£ 96.70	133.00
June	£ 46.68	99.87
Total £	227.22	339.66

Shop

	2015	2014
April	£ 450.64	756.30
May	£ 568.10	825.72
June	£ 770.08	701.99
Total £	1788.82	2284.01

Comments

Generally, visitors numbers are up due to a series of large free outdoor events (Waterloo, Fete de la

Musique, Nursery School Fete), but ticket sales are down as many people did not come inside and therefore did not give donations or spend in the shop.

Museum Shop

Sales are down on last year, mainly as a result of the fact that fewer school groups have been allowed to use the shop by teachers (an increasingly common phenomenon!).

Publicity, Marketing, Social Media and New Website

The Museum currently has **556 ‘Likers’** on **Facebook** and **1,194 Followers** on **Twitter**.

This is the first full quarter where the Museum’s **new website** has been on-line. There are still some visitors to the old Museum pages on the Council website, but these are obviously much lower than in previous quarters and web users are now being directed to the new website. The May peak may be partly due to the activities and events that month, but the ‘top page’ in June is for ‘Community of Collectors’. Thanks are due to Tony Morton for providing a comprehensive breakdown of the new website figures, and to Bruce Tice (UDC) for assistance with the transition from old to new website.

	Old Website (Council website)	New Website		
	Pageviews	Pages	Visits	Unique Visitors
April	<i>Figure provided for whole quarter only</i>	3,169	599	258
May		5,651	1,360	861
June		4,664	998	627
TOTAL for Q1	668	13,484	2,957	1,746

Pages: the number of "pages" viewed by visitors.

Visits: the number of visits made by all visitors. (This could be described as the number of "sessions", implying the possibility of multiple pages per visit and multiple visits per unique visitor).

Unique Visitor: the number of persons or computers (hosts) that have made at least 1 hit on 1 page of the website during the current period. If a user makes several visits during this period, it is counted only once. Visitors are tracked by IP address, so if multiple users are accessing the website from the same IP (such as a home or office network), they will be counted as a single unique visitor.

5 Education, Events and Outreach

5.1 Education

17 sessions were taken by the Learning Officer

Analysis of School Visits and Pupil Numbers

No. of pupils in sessions taught by Learning Officer in Museum *	517
No. of pupils taught in visits out to schools by Learning Officer	26
No. of pupils in independent visits to Museum *	61
No. of pupils benefiting from schools loan boxes in classroom	98
Total no. of pupils benefiting educationally from Museum Service	702

* These figures plus 143 teachers/adults accompanying paying school and independent groups provide total school visits in Visitor table in 4.3

Loan and reminiscence boxes:

The Prehistory Loan box was used by two different schools this term. The Fossil loan box was used by the Bell Day Nursery in Saffron Walden. The World War II loan box is currently being used by Henham and Ugley Primary School.

5.2 Events on-site (in Museum and grounds)

Date	Event	No. Attending
8 and 9 April	Magnificent Mosaics Easter family events 190 + 140	330
9 May	Freshwell Youth Art Group drawing fossil specimens	10
15 May	Museums at Night – explore the museum by torchlight 6-8pm	139
28 May	Museum birthday parties x 2	74
30 May	Outdoor events Waterloo 200 anniversary Museum Grounds	350
13 June	Nursery School Fete in Museum Grounds	265
21 June	Fete de la Musique in Museum Grounds	450
	Total	1618

5.3 Outreach (Museum activities, talks and lectures at other venues)

Date	Event	No. Attending
18 May	Talk to Braintree & Bocking Historical Society (Curator)	40
10 June	Dunmow Reminiscence Group (GT and HW)	21
21 April	Saffron Walden Town Hall Dementia Café (HW)	16
	Total	77

Other Museums and Local Groups supported (Uttlesford) 10 groups, 9 meetings)

Museum staff have attended meetings, site visits, undertaken work or given advice to:

- Dig It Community Allotment – investigating Museum and Castle grounds as a possible site for planting free seeds (Natural Sciences Officer)
- Essex Field Club - 2 meetings, treasurer work, 2014 accounts (Natural Sciences Officer).
- Saffron Walden Wild Flower Group - liaison re verge on Debden Road (Natural Sciences Officer)
- Special Roadside Verges project – 1 meeting, 2015 surveys, April cut, comments on 4 planning applications (Natural Sciences Officer)
- Sustainable Uttlesford – 1 meeting (Natural Sciences Officer)
- Saffron Walden Searchers Metal-Detecting Club - 1 meeting (Curator)
- Dunmow Museum Committee – AGM (Curator)
- Fry Art Gallery - 1 committee meeting and AGM (Curator)
- Hadstock Millennium Committee (Battle of Assandun event 2016) – 2 meetings, one hosted by Museum (Curator)
- Wendens Ambo Society – advice on organising archaeological project and preliminary discussions on further Museum support 2016

Staff also attended the first public display of the Stansted ‘Magna Carta’ Embroidery at Forrest Hall School on 23 June, with a view to displaying the embroidery in the Museum sometime in 2016.

Attendance of meetings, advice, support or involvement in organisations outside Uttlesford

- Learning Officer has attended three meeting with Cambridge University (Departments of Education and Archaeology) to look into developing public engagement partnerships/projects.

Schoolroom Hire

Kids party – 18 April (£70 hire and Toys session with Casual and Visitor & Learning Services Officer)
Didi Dance – 20 May (£20 1 hour hire)

Grants and Support

Grants towards the cost of events in May have been reported in previous quarters.

Applications have been made for grants to the Essex Heritage Trust (for analysis of geophysical survey of Museum and Castle site) and to the V&A Purchase Grant Fund (to assist the Museum Society in purchasing an archaeological find offered through the Treasure Act 1996). Results expected in July.

Local Performance Indicators

Definition	This Quarter Actual Q1	This Quarter target Q1	Cumulative 2015-16	Annual Target 2015-16
Visitors PI 22 SI 12c	4,925	3,400	4,925	14,000
Users PC 01 CI 39	8,095	5,100	8,095	21,000

Notes on Performance Indicators

Visitors are all those visiting the Museum in person, including activities and events in the grounds.

Users are all those engaging with the Museum Service in person or through other media, and include:

- those visiting the site (visitors, as above)
- those attending off-site events (e.g. talk or other off-site activity by Museum staff)
- those using the Museum ‘remotely’ (enquiries, research and services by phone, email, fax and letter and website visits which were 2,957 on the new website this quarter)

Comment: an exceptional combination of on-site special events in May, with fine weather and grant-aid for the Waterloo event, have boosted visitor figures beyond the norm.

The good performance of the new website has further enhanced User figures. Note that the Visits have been used rather than Pages or Unique Visitors, as Visits (“sessions”) is directly comparable to the way Museum visitors are counted.

Previously, ‘Pageviews’ per quarter were provided from the Council website, this being derived from Audit Commission definitions of national performance indicators for museums some years ago. Pageviews on the Council website for the Museum averaged at 2,142.5 per quarter over the last two financial years (from April 2013 to March 2015).

Future Programme, July-September 2015

Main activities and items to note for the next quarter:

1 Museum Management and Staff

Sarah Kenyon's Support Worker who is funded by Access to Work is on leave for 6 weeks from 6 July and an agency replacement has been found only after some difficulty.

2 Buildings and Site

Dependent on completion of contractors' work at Shirehill before a timetable for moving collections in can be established.

Two issues requiring urgent attention in the Museum:

- Fire alarm system upgrade (under discussion with Sunfish and the Council)
- Fibre-optics display lighting in Ancient Egypt gallery (persistent failure, needs replacing, staff investigating (a) short-term mitigation measures and (b) options for replacement and cost)

3 Collections and Research

Members of the public continue to bring in objects for identification and make enquiries or other requests despite suspension of these services. Staff can sometimes deal with 'on the spot' identifications and urgent items otherwise these services have to remain suspended until collections have been moved into the new store.

4 Displays and Visitor Services

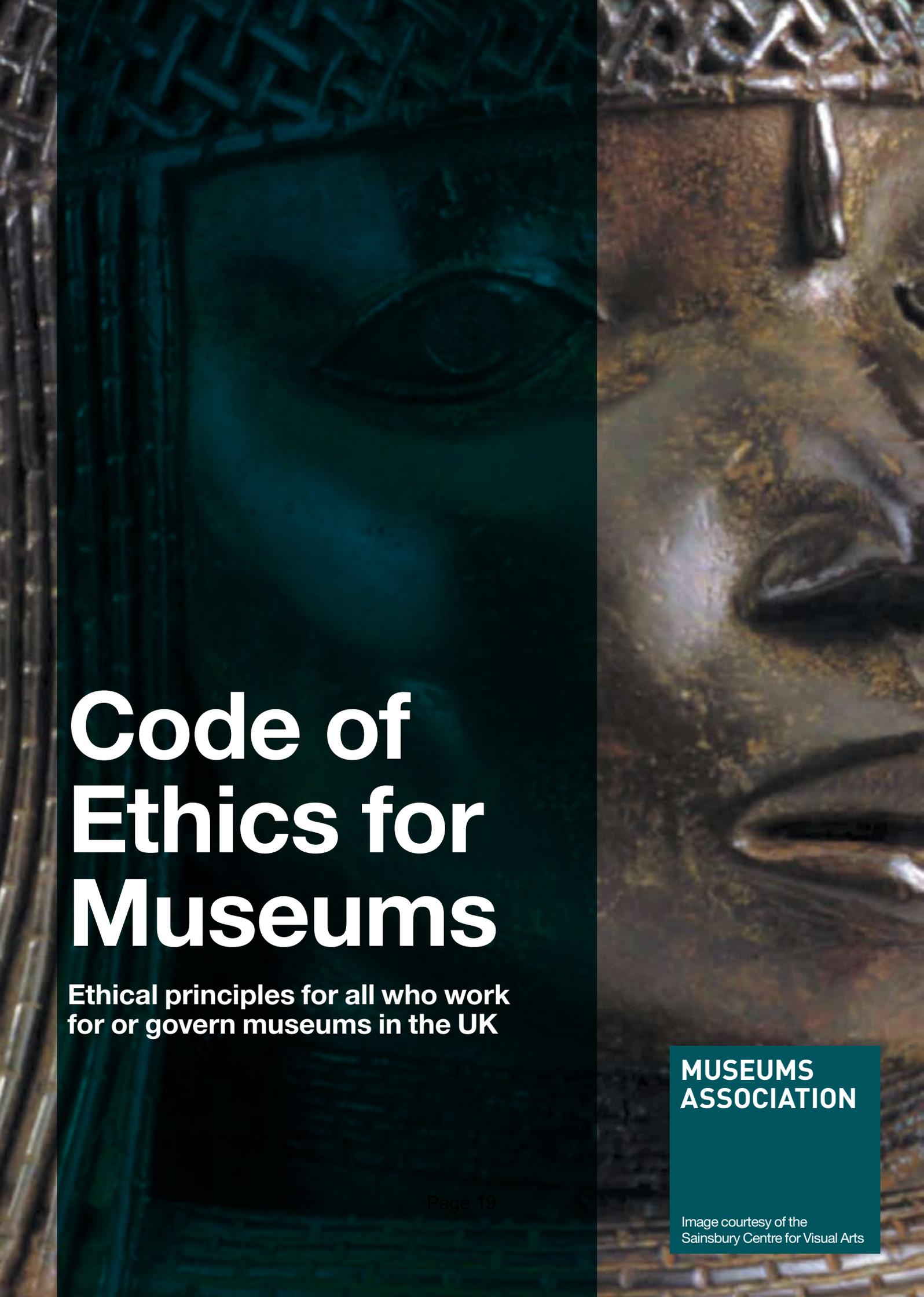
Uttlesford a Community of Collectors will open on 29th August, with a private view for Museum Society members and guests on Friday 28th August to which all MMWG members and Uttlesford councillors will be invited.

Update of the treasure case in the archaeology gallery is anticipated in early August to put recent acquisitions in display (subject to impact of Shirehill store project and other urgent issues on the Curator's time)

5 Education, Events and Outreach

All school visits are complete until September. The Visitor Services & Learning Officer will be focusing on the summer holiday activities, which take place on the 5th, 12th and 19th August.

We also have the Heritage Open Weekend forthcoming 12-13 September.



Code of Ethics for Museums

Ethical principles for all who work
for or govern museums in the UK

**MUSEUMS
ASSOCIATION**

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from the Museums Association's
website: www.museumsassociation.org

Foreword

What is a code of ethics actually for? I believe it is to identify potential pitfalls; to offer guidance in difficult situations; to provide consistency in dealing with issues so we don't all make it up as we go along; and to maintain the confidence of benefactors, originators and society as a whole. But above all, I believe it is to help museum professionals resolve the operational and management problems that they face day in, day out.

A code of museum ethics should represent and articulate a set of consensual values and standards of behaviour that are agreed at a particular time to define a relationship of trust between the museum and the communities it serves. This Code of Ethics for Museums is the result of over 25 years of ethical development in the UK and overseas museum sectors.

In order to be helpful a code of ethics must be both aspirational and pragmatic. It must set high standards for professional behaviour, but ensure that its guidance is realistic and capable of being implemented by a wide range of museums. There is no point in occupying the ethical high ground if that results in museums becoming unsustainable.

It is always tempting to believe that things were simpler in the past, but I do truly believe that museums are currently facing unparalleled challenges. And this is where I think a code of ethics really comes into its own. If the problems we face every day were easily resolved, we would not need a code of ethics to guide us. The code is a navigational aid to help us to negotiate sometimes uncharted waters. If the code said 'this is too dangerous, don't even think about setting off', what help would that be to us?

It must, therefore, be a constantly evolving document, subject to scrutiny by and consultation with both the museum sector and society. The code will not tell us what to do but, if used correctly, will inform policy development and ensure that ethical dilemmas are considered in a balanced way. This is what society expects of us.

This latest revision of the code is the result of thoughtful input from numerous colleagues from every kind of museum. I would particularly like to acknowledge the contributions of Tristram Besterman, the previous convener of the ethics committee, Maurice Davies and, above all, Caitlin Griffiths, who lead the consultation. The ethics committee also played an indispensable role as a critical sounding-board in the code's development.

Vanessa Trevelyan

Convener

Museums Association Ethics Committee, 2001-present

Production of the Code of Ethics for Museums was overseen by the Museums Association Ethics Committee.

For advice on ethical matters or information on ethics training please contact the Museums Association at the address shown on page 2.

How to use this code

You will need to exercise judgement in applying the principles set out in the Code of Ethics for Museums. A number of sometimes competing considerations may need to be balanced. An ethical decision does not usually depend on a choice between 'right' and 'wrong' but between competing 'rights'. There is nothing wrong, for example, with a decision to 'accept financial support from commercial organisations...' (10.6). However, it would be unethical to accept such support if it is offered only on condition that the museum advertise a company's products on exhibit labels. Guidance on interpretation and application of the code can be sought from the Museums Association (MA), which may refer matters to its ethics committee for a definitive judgement.

Exercising judgement is required not only in assessing alternative courses of action but also in determining the extent of your responsibility as an individual. All those who work for or govern museums should endeavour, in their particular role, as far as it is within their power to do so, to ensure that the principles of the Code of Ethics for Museums are upheld in their institution or practice. Sometimes responsibilities lie very directly with individuals. It is, for example, the particular responsibility of event organisers to refer to 6.5 and to ensure that they 'Pay due regard to safeguarding collections and the public's right of access whenever museum premises are used for functions.'

However, all who work for museums do so on behalf of the museum's governing body, which has ultimate responsibility for policy and decisions affecting the governance of the museum. Responsibility may not therefore lie solely with an individual, but that individual should take responsibility for encouraging and assisting colleagues and the governing body to act ethically. For example, members of staff whose duties do not include organising functions should discuss with senior staff any concerns they may have over restrictions on public access when functions are held. Senior staff should give due consideration to legitimate concerns and assist the governing body to address them in setting ethically sound policy in this and all other key areas.

Members of governing bodies and policy

Members of governing bodies should be familiar with the code in its entirety. Their attention is drawn in particular to the following sections and points in the code: section 1; section 2.0 to 2.12; section 5.0 and 5.1; section 6.0 to 6.2, 6.9 to 6.14; and section 10.

The code should be referred to when defining the mission of a museum and in any policy development.

Ethical and legal obligations

The Code of Ethics for Museums defines standards that are often higher than those required by law. It is, however, self-evident that the code cannot override the legal obligations and rights of those who work in or for museums, including those arising from any contractual relationship there may be with an employer or client. The code represents the consensus view of members of the MA, which includes both those who work in museums and the institutions that employ them.

The MA therefore encourages employers to assure adherence to the Code of Ethics for Museums as a contractual requirement. An effective way of achieving this is to include reference to upholding and promoting the MA's Code of Ethics for Museums in job descriptions that form part of an employee's contract of employment.

The MA also recommends that adherence to the code should be used as a standard requirement in contracts between consultants and their clients.

The Code of Ethics for Museums must be subordinate to the legal powers and obligations of governing bodies responsible for museums and the legal powers and obligations of individual members of such bodies. However, the MA believes this code's provisions to be in the best interests of the public and therefore urges all museum governing bodies (and where appropriate, subsidiary, subcontracted or delegated bodies such as executive committees, contractors or managing bodies), formally to adopt it.

The Code of Ethics for Museums and other voluntary standards

Ethical standards developed by the MA have informed the national Accreditation scheme for museums in the UK at an institutional level. Accreditation is administered by the Museums, Libraries and Archives Council.

The MA supports the work of specialist organisations in the UK whose members are involved in museum work and who may produce their own codes of ethics and ethical guidelines. The MA can help in cross-referencing to these codes and guidelines and in referring enquirers to appropriate sources of specialist advice.

The Code of Ethics for Museums is consistent with the Code of Ethics for Museums worldwide produced by the International Council of Museums (ICOM). The MA supports ICOM's work.

The MA encourages its members to support international conventions relating to museums whether or not these conventions have been ratified in the UK, where consistent with this code and the law.

This code and membership of the Museums Association

The MA is registered as a charity. It is a non-governmental, independently financed membership organisation providing services to and reflecting the interests of museums and those who work for, and govern them. The Code of Ethics for Museums outlines ethical principles for all museums in the UK. The code applies to members of staff, paid or unpaid, to consultants and those who work freelance, to members of museum governing bodies, and to those who work for or govern organisations that support, advise or provide services to museums, including the MA.

The MA expects all members to uphold and to promote the Code of Ethics for Museums as a professional obligation. To achieve Associateship of the Museums Association (AMA) members must demonstrate awareness of the code and the ways in which it is used. To achieve Fellowship of the Museums Association (FMA) members must show that they promote the wider application of the code within museums.

The Code of Ethics for Museums applies to individuals and institutions. The code is intended to underpin museum policies and to guide members of museum governing bodies. The MA expects its institutional members to uphold the Code of Ethics for Museums and encourages them formally to adopt it.

The structure of the code and related material

The spirit of the code is as important as the letter. The code is informed by a belief that ethical behaviour is as much about developing good practice as avoiding malpractice. Therefore, the numbered points in each section, which define and detail ethical activity, are expressed in positive rather than negative terms. The MA's definition of a museum can be found on p9. The values in the definition are elaborated in a statement of ten core museum values that preface the code. The values serve as a summary of the key points of the code and as headings for sections within it. The coloured sections under each heading in the code describe different aspects of museum activity and the ethos that informs them in museums at their best. These sections should be read with that consideration in mind.

The current code and guidelines, together with other updated related material and further information on practicalities associated with ethical good practice can be found on the MA's website: www.museumsassociation.org

This document is also supported by additional ethical guidelines:

- Disposal toolkit, 2008
- Acquisition, 2004

The definition, the core values, the code and the ethical guidelines move from principles to practice offering increasingly detailed guidance appropriate to different levels of involvement in particular aspects of museum activity.

Advice on ethical matters and ethics training

The MA offers free, confidential advice on ethical matters to people who work for or govern museums. In addition, training sessions on museum ethics are held throughout the UK. Sessions can be arranged specifically for people who work for museums or for those who govern them, or for mixed groups of both. In-house sessions can be arranged in individual museums on general or specific themes. These sessions can usually be provided free of charge or at minimal cost. For further information please contact the MA at the address shown on p2.

Historical note

The Code of Ethics for Museums was adopted at the October 2001 Annual General Meeting (AGM) of the MA and came into force in April 2002. Section 6 of the code was revised in 2007 and the wording was adopted at the October 2007 AGM. The Code of Ethics for Museums replaces the Code of Conduct for People who Work in Museums, adopted at the 1996 AGM, and the Code of Practice for Museum Governing Bodies, adopted at the 1994 AGM. Those codes themselves replaced earlier codes, listed below.

- The Code of Conduct for Museum Professionals, 1991
- The Code of Conduct for Museum Curators, 1983, revised 1987
- Guidelines for Professional Conduct, 1977
- Code of Practice for Museum Authorities, 1977, revised 1987.

The foundations for the publication of the association's first ethical standards and their subsequent development in the UK were laid by the Museum Assistants' Group (later renamed the Museum Professionals Group) between 1970 and 1983.

Glossary

Museum

Users of the Code of Ethics for Museums should be familiar with the MA's definition of a museum:

'Museums enable people to explore collections for inspiration, learning and enjoyment. They are institutions that collect, safeguard and make accessible artefacts and specimens, which they hold in trust for society.'

In this definition and hence throughout the code, 'museums' should be taken to include galleries and subsidiary companies of museums.

A collection is an organised assemblage of selected material evidence of human activity or the natural environment, accompanied by associated information. As well as objects, scientific specimens or works of art held within a museum building, a collection may include buildings or sites.

Safeguarding includes undertaking conservation, security and collections management.

Making accessible includes undertaking interpretation, education, exhibition, outreach, documentation, research and publication, within or outside the museum's own buildings.

Dealing

Dealing is making a speculative acquisition with the intention of reselling for profit.

Governing body

The governing body of a museum is the principal body of individuals in which rests ultimate responsibility for policy and decisions affecting the governance of the museum. Legal title to the assets of the museum may be vested in this body.

In the case of a museum limited by guarantee the governing body is the board of directors or council of management.

In the case of a local authority museum, it is the full council of the authority. In some local authorities, however, under standing orders, policy decisions vested in full council are delegated to individual elected members or small groups of elected members. Such delegated powers, where formally agreed, may extend to include decisions on ethically-sensitive issues such as disposal.

In the case of a national museum or a museum run by a trust, it is the full board of trustees.

In the case of a museum run by an unincorporated association it is the committee.

In the case of a university museum it is the council (or other-named supreme governing body) of the university.

Public and society

The word 'public' is used in this code in two senses, that inter-connect.

The idea of society having a legitimate interest in museums and their activities is an underpinning value of the code. It is reflected in the use of the word 'public' in terms such as public domain, public service, public trust and public interest.

The word 'public' is also used to characterise those who are users of the museum (see below).

(An Accredited museum – see below – must comply with public access criteria prescribed by the Museum Accreditation Scheme).

Accredited museum

An Accredited museum is a museum provisionally or fully Accredited under the national Accreditation scheme for museums in the UK administered by the Museums, Libraries and Archives Council.

Users

Users are all those individuals and groups with whom the individual museum is actively engaged, to mutual benefit. That sense of the public served by a museum will be reflected in the individual museum's corporate mission and aims, which should define its target audiences. They may include past, current and potential users of the services provided by the museum.

Code of Ethics for Museums

Society can expect museums to:

- hold collections in trust on behalf of society
- focus on public service
- encourage people to explore collections for inspiration, learning and enjoyment
- consult and involve communities, users and supporters
- acquire items honestly and responsibly
- safeguard the long-term public interest in the collections
- recognise the interests of people who made, used, owned, collected or gave items in the collections
- support the protection of natural and human environments
- research, share and interpret information related to collections, reflecting diverse views
- review performance to innovate and improve.

Museums enable people to explore collections for inspiration, learning and enjoyment.

They are institutions that collect, safeguard and make accessible artefacts and specimens, which they hold in trust for society.

1

Society can expect museums to:

Hold collections in trust on behalf of society

1.0

Museums behave as ethical guardians as well as owners of collections. They never relinquish the trust invested in them, without public consent.

All those who work for or govern museums should ensure that they:

1.1

Uphold public trust responsibilities. View the museum as the guardian of its collections.

1.2

Retain items in the public domain at whichever location provides the best balance of care, context and access.

1.3

Avoid behaviour that could be construed as asserting personal ownership or control of collections or any part of them.

1.4

Treat collections as non-negotiable assets in financial affairs. Refuse to mortgage collections or offer them as security for a loan. Sustain the financial viability of the museum irrespective of any valuation placed on items in its collections.

1.5

Fulfil all the museum's guardianship responsibilities in respect not only of the collections but also of all other resources (for example, premises, land and information), which, in explicit or moral terms, it holds in trust for the benefit of the public.

2

Society can expect museums to:

Focus on public service

2.0

Museums belong to everybody. They exist to serve the public. They should enhance the quality of life of everyone, both today and in the future. They are funded because of their positive social, cultural, educational and economic impact.

All those who work for or govern museums should ensure that they:

2.1

Recognise the public purpose of museums. Put the public interest before other interests.

2.2

Uphold the highest standards of personal conduct and corporate integrity expected in public service.

2.3

Account for actions and decisions, be willing to justify them and take responsibility for the consequences that flow from them.

2.4

Uphold, promote and abide by the Museums Association's ethical standards both in the letter and the spirit of this Code of Ethics for Museums. Never require or suggest that anyone should act in conflict with the principles of the code.

2.5

Keep up to date with and work towards achieving other widely accepted standards, such as the Museums Association's ethical guidelines, the Accreditation scheme for museums in the UK and successor schemes. Respect the ethical codes of others where consistent with this one.

2.6

Avoid any private activity or pursuit of a personal interest that may conflict or be perceived to conflict with the public interest.

2.7

Declare to the governing body and have recorded by it any activity or pursuit of any interest that may conflict or be perceived to conflict with the public interest.

2.8

Understand legal responsibilities as members of staff or governing bodies and make all policy and practice at the museum comply with the law. Understand that personal liabilities may follow from insolvency or wrongful or fraudulent trading and from breaches of company, charity or trust law.

2.9

Adhere to the museum's constitution, which should establish its purpose and legal status and the role and composition of the governing body. Regard the constitution as a public document. Require each individual member of the museum's governing body to assume equal responsibility for adherence to the museum's constitution, approved procedures and codes of practice. Note that absence from a meeting of the governing body does not necessarily absolve an individual member from any liability for a decision taken at that meeting, should there be any question of breach of trust or statutory default.

2.10

Do not allow the chair or any individual member of a governing body to take on autonomous powers for decisions and actions unless formally delegated to do so, and then only on the basis that the actions of the individual are fully and promptly reported back to the governing body, as required by the rules of the governing body.

2.11

Consider the effect of activities conducted in private life on the reputation of the museum and of museums generally.

2.12

Observe recognised public service standards regarding gifts or favours. Refuse to solicit from any person or body, and turn down if offered, any personal gift or favour that might subsequently be interpreted as an inducement to promote or trade with that person or body. Declare any offer of a personal gift or favour and consult at an appropriate level of authority in advance of acting. Record the decision whether or not a gift or favour is accepted. Record gifts or favours accepted by individuals in accordance with well-defined, publicly-transparent procedures.

2.13

Refuse to draw on status or position at the museum, or the museum's resources, for personal gain or advancement without prior permission. Have in place policy and procedures so that private work undertaken by employees is approved in advance and does not conflict with the museum's interest or wider public interest. Consider the current needs of the museum in deciding the proportion of any fees that may be retained by employees engaged in private work.

2.14

Refuse to identify, authenticate or value items in private ownership for personal payment, gifts or favours.

2.15

Avoid all activities that could be construed as trading or dealing in cultural property unless authorised in advance by the governing body. Refuse to deal in any material covered by the museum's acquisition policy, to engage in private collecting in competition with the museum or to use a connection with the museum to promote private collecting. Refuse to acquire any items from collections that the museum has disposed of.

2.16

Declare to the museum, and have approved by its governing body, any significant private collecting that may be covered by the museum's acquisition policy. Apply, in any private collecting, the same ethical standards as museums adopt generally, refusing, for example, to acquire illicit material. Collect for private purposes on collecting or field trips only with explicit prior agreement from the museum and if the collecting is incidental and the time involved is reasonable. Make clear to all parties whether an item is being collected for a museum or a private collection.

2.17

Avoid being seen as representing the museum if speaking personally or on behalf of outside organisations whose practices and purposes conflict with that of the museum.

2.18

Recognise that it is legitimate for people who work in museums to present evidence based on their knowledge and experience of subjects that are a matter of public concern or controversy. Obtain authorisation before making statements on sensitive issues that affect the museum. Base any public comments as far as possible on sound scholarship and reliable information.

3

Society can expect museums to:

Encourage people to explore collections for inspiration, learning and enjoyment

3.0

Museums have the generosity of spirit to be approachable at every point of contact, to reach out to audiences and to increase access to their collections. As educational institutions, museums encourage a participative approach to learning. However specialised their subjects or remote their locations, they develop new audiences and deepen relationships with existing users. Museums recognise that individuals have varied backgrounds and varying physical, intellectual and cultural needs and expectations.

All those who work for or govern museums should ensure that they:

3.1

Improve the quality of experience for all users.

3.2

Recognise the diversity and complexity of society and uphold the principle of equal opportunities for all.

3.3

Develop and promote the museum to appeal to an ever broader and more varied audience. Aim to provide something of interest to every potential user.

3.4

Promote public awareness, understanding and appreciation of the museum. Promote the educational role of the museum in its widest sense and cater for a broad range of interest levels and abilities.

3.5

Take account of individuals' differing educational experiences, learning styles, abilities and ways of understanding. Provide a choice of types and levels of access.

3.6

Respond to the diverse requirements of different cultural groups.

3.7

Respond to the needs and wishes of people with disabilities. Have in place effective systems to ensure that buildings, displays and other services are increasingly accessible to people with physical, sensory or learning disabilities.

3.8

Take account of present and potential users' ability and willingness to visit if admission or other charges are levied.

3.9

Make provision for those who are not currently prepared or able to visit. Use a variety of means to improve access, such as outreach, publishing or websites.

3.10

Make the museum's services available on a regular basis and at times which reflect the needs of users and potential users. Make opening times, events and other services widely known. Make explicit the levels of access available to collections, including items not on display.

3.11

Respond positively to people's expectations of access to museum collections, whether displayed or not. Regularly review the means available to the museum to make collections more accessible, either directly or in electronic or published form.

3.12

Reconcile the museum's role in safeguarding items for the benefit of future users with its obligation to optimise access for present users. Make explicit the criteria used if access needs to be restricted.

3.13

Make provision not just for safeguarding the collections but also for keeping them accessible whenever a building that houses collections needs to be closed or isolated.

3.14

Assist everyone who makes a reasonable request for information. Give public access to all documentation and other information held by a museum, unless the information was imparted in confidence, or it can be shown that the wider public interest demands that access be restricted (for example to protect collections or prevent abuse of sites of historic or scientific importance).

4

Society can expect museums to:

Consult and involve communities, users and supporters

3.15

Consider restricting access to certain specified items where unrestricted access may cause offence or distress to actual or cultural descendants. Provide separate storage facilities where appropriate. (See also section 7, Recognise the interests of people who made, used, owned, collected or gave items in the collections.)

3.16

Facilitate public access to the expertise of members of staff. Allow public access to unpublished research carried out on behalf of the museum unless there is a genuine need to protect the research.

3.17

Undertake identifications to the highest scholarly standards and provide as many significant facts about an item as possible. Do not conceal any lack of specialised knowledge and recommend other appropriate sources of advice to enquirers whenever possible.

3.18

Encourage public appreciation of the cultural rather than financial value of items. Refuse to put a financial value on items for the public. (Valuation for a museum's own internal management processes, such as insurance and acquisition is ethical.) (See also section 5, Acquire items honestly and responsibly.)

3.19

Balance provision for particular groups or individuals, such as specialist enquirers, with long-term provision for a wider audience.

4.0

Museums seek the views of communities, users and supporters and value the contributions they make. Museums actively involve them in developing policy, and balance this with the role of museums in leading and promoting debate. Museums engage with changing needs and values.

All those who work for or govern museums should ensure that they:

4.1

Consult and involve groups from communities they serve and their representatives to promote a sense of shared ownership in the work of the museum.

4.2

Use advisory and support groups but do not exploit them. Make the status and influence of advisory and support groups clear to their members, treat their views with respect and protect their confidences.

4.3

Work in partnership with others. Involve partners in decision-making. Treat partners with respect. Exercise the authority vested in the museum responsibly and guard against the unwitting or deliberate misuse of power. Remain sensitive to the possibility that the museum, however unintentionally, may act in a way that lacks empathy. Clarify the aspirations of the museum and partner organisations and establish common ground. Draw up clear statements of objectives and working methods for joint projects.

4.4

Keep up to date with social and economic change affecting any specific communities served by the museum. Work collaboratively with other organisations to address social disadvantage and exclusion.

5

Society can expect museums to:

Acquire items honestly and responsibly

5.0
Museums develop collections using long-term plans that are socially responsive. They reject items with dubious provenance. Museums regularly review, publish and adhere to acquisition policies agreed by the governing body that are realistic in terms of the resources required to sustain them. These policies address issues of the context and legitimacy of acquisitions, due diligence, long-term care, documentation and relevance to overriding, institutional aims. Items are acquired on the basis that they will be retained in the public domain.

All those who work for or govern museums should ensure that they:

5.1
Collect according to detailed, published policies that state clearly what, how and why the museum collects. Frame the acquisition policy in the light of the museum's stated mission. Specify criteria for future acquisitions that include topics, time periods and geographical areas. Collect only within acquisition policies, except in exceptional circumstances.

5.2
Acquire an item only after thorough consideration of its long-term value and how it will be used.

5.3
Accept an item only if the museum can provide adequate, continuing long-term care for the item and public access to it, without compromising standards of care and access relating to the existing collections.

5.4
Examine carefully the implications of, and record the reasons for, accepting items that will not be immediately accessioned into the permanent collection. (Acceptable reasons may include loan, demonstration, handling, testing or retention pending a final decision to accession into the permanent collection.)

5.5
Co-operate rather than compete with other UK museums when collecting. Recognise that other institutions collecting in the same or related fields may have a stronger claim to acquisition of a particular item. Resolve disputes with other museums constructively and in the best interest of the public. Take account of the interests not only of other registered museums but also of related public organisations, such as archives.

5.6
Recognise that individuals or communities may have a stronger claim to certain items than the museum. Take account also of scientific arguments for and against leaving items in their original context. (See also section 7, Recognise the interests of people who made, used, owned, collected or gave items in the collections and section 9, Research, share and interpret information related to collections, reflecting diverse views.)

5.7
Exercise due diligence when considering an acquisition or inward loan. Verify the ownership of any item being considered for acquisition or inward loan and that the current holder is legitimately able to transfer title or to lend. Apply the same strict criteria to gifts, bequests and loans as to purchases.

5.8
Reject any item if there is any suspicion that it was wrongfully taken during a time of conflict, unless allowed by treaties or other agreements.

5.9
Reject any item if there is any suspicion that it has been stolen unless, in exceptional circumstances, this is to bring it into the public domain, in consultation with the rightful owner.

5.10
Reject items that have been illicitly traded. Note that the UNESCO Convention (on the Means of Prohibiting and Preventing the Illicit Import, Export and Transfer of Ownership of Cultural Property) was finalised in 1970. Reject, therefore, any item if there is any suspicion that, since 1970, it may have been stolen, illegally excavated or removed from a monument, site or wreck contrary to local law or otherwise acquired in or exported from its country of origin (including the UK), or any intermediate country, in violation of that country's laws or any national and international treaties, unless the museum is able to obtain permission from authorities with the requisite jurisdiction in the country of origin. (See the Department for Culture, Media and Sport [DCMS] guidelines on combating illicit trade for more detailed guidance.)

5.11
Reject any item that lacks secure ownership history, unless there is reliable documentation to show that it was exported from its country of origin before 1970, or the museum is acting as an externally approved repository of last resort, or in the best judgement of experts in the field concerned the item is of minor importance and has not been illicitly traded.

5.12
Contact colleagues and appropriate authorities both in the UK and overseas for any information or advice that may be necessary to inform judgement regarding the legitimacy of items considered for acquisition or inward loan.

5.13

Comply not only with treaties that have been ratified by the UK government, but also uphold the principles of other international treaties intended to curtail the illicit trade, if legally free to do so.

5.14

Report any suspicion of criminal activity to the police. Report any other suspicions of illicit trade to other museums collecting in the same area and to organisations that aim to curtail the illicit trade.

5.15

Avoid appearing to promote or tolerate the sale of any material without adequate ownership history through inappropriate or compromising associations with vendors, dealers or auction houses. Refuse to lend items to any exhibition that is likely to include illicitly traded items.

5.16

Decline to offer expertise on, or otherwise assist the current possessor of any item that may have been illicitly obtained, unless it is to assist law enforcement or to support other organisations in countering illicit activities.

5.17

Exercise caution when accepting conditions attached to acquisitions, particularly those involving gifts and bequests. Discuss expectations and clarify in writing the precise terms on which all parties are accepting transfer of title. Specify unambiguously to donors the museum's intentions regarding such matters as: the long-term retention of items; display; storage and public acknowledgement. (See also section 7, Recognise the interests of people who made, used, owned, collected or gave items in the collections.)

5.18

Refuse tactfully but firmly to accept an offer of a gift or bequest if items offered do not meet criteria set out in the museum's collecting policy. Explain why the museum is unable to accept an offer of a gift or a bequest.

5.19

Refuse, in writing, any unwanted, unsolicited gifts even if the museum has been advised that they need not be returned. Consider informing intending benefactors, or their representatives, about other registered museums, archives or other public institutions that may be interested in the unwanted items.

5.20

Comply with conditions attached to an acquisition once the acquisition has been made. (See also section 7, Recognise the interests of people who made, used, owned, collected or gave items in the collections.)

5.21

Use agreed procedures for taking the final decision to acquire an item. Open procedures for transfer of title to external audit.

5.22

Encourage potential sellers to get an independent valuation when offering items for sale to the museum. Seek the best discount from vendors once they are aware of the likely value on the open market of items they offer to sell to the museum.

5.23

Have in place procedures approved by the governing body for loans from and to the museum, including historic loans.

For further guidance see also the MA's ethical guidelines on acquisition or visit the Cultural Property website at www.culturalpropertyadvice.gov.uk

6

Society can expect museums to:

Safeguard the long-term public interest in the collections

6.0

Collections are a tangible link between the past, present and future. Museums balance the interests of different generations by safeguarding collections, which may include buildings and sites.

Museums develop and implement a collections policy in order to ensure appropriate standards of care and security for all items entrusted to them, either permanently or on loan.

Museums meet their responsibility to future generations by ensuring that collections are well managed and sustainable. There is a strong presumption in favour of the retention of items within the public domain. Sometimes transfer within the public domain, or another form of disposal, can improve access to, or the use, care or context of, items or collections. Responsible, curatorially-motivated disposal takes place as part of a museum's long-term collections policy, in order to increase public benefit derived from museum collections.

All those who work for or govern museums should ensure that they:

6.1

Act as guardians of the long-term public interest in the collections.

6.2

Publish, implement and regularly review a forward-looking collections policy, approved by the governing body, which specifies standards of care. Define, in the collections policy, levels of care appropriate for different parts of the collection, acceptable levels of risk and how items will be made accessible.

6.3

Protect all items from loss, damage and physical deterioration, wherever they are. Maintain appropriate standards of protection against hazards such as theft, fire, flood, vandalism and deterioration of the collections resulting from adverse environmental conditions. Specify the action to be taken in the event of disasters threatening the museum's buildings, staff, visitors, records or collections. Make every effort to protect the collections in the event of a disaster but never put people's lives at risk.

6.4

Balance the duty of maintaining and enhancing collections for future generations with that of providing appropriate services to today's public. Reconcile security and conservation requirements with users' rights of access and the desirability of lending outside the museum.

6.5

Pay due regard to safeguarding collections and the public's right of access whenever museum premises are used for functions.

6.6

Make provision for safeguarding collections whenever buildings housing them are closed or isolated, whether this is planned or unexpected.

6.7

Make arrangements to care properly for the health and wellbeing of any live animals for which the museum is responsible.

6.8

Recognise that formal title to and guardianship of the collections is vested in the governing body, which must satisfy itself that decisions to dispose are informed by the highest standards of expertise and take into account all legal and other attendant circumstances.

6.9

Demonstrate clearly how the long-term local and general public interest is served in circumstances in which disposal may be appropriate and ensure that public trust in museums is upheld.

6.10

Give priority to transferring items, preferably by gift to registered or accredited museums. Consider donating items to other public institutions if it is not possible for another museum to accept them. To maintain public confidence in museums wherever possible do not transfer items out of the public domain. (This paragraph excludes material that is being disposed of because it is damaged beyond use, or dangerous, or is being returned to its place of origin or rightful owner.)

6.11

Base decisions to dispose on clear, published criteria as part of the institution's long-term collections policy, approved by the governing body. Ensure transparency and carry out any disposal openly, according to unambiguous, generally accepted procedures. Manage the process with care and sensitivity to public perceptions.

6.12

Seek the views of stakeholders (such as donors, researchers, local and source communities and others served by the museum) who have a vested interest in a proposed disposal. In some cases consent from the donor may be a legal requirement. Where appropriate seek the views of colleagues and sector bodies.

6.13

Refuse to undertake disposal principally for financial reasons, except in exceptional circumstances as defined in 6.14. Financially-motivated disposal risks damaging public confidence in museums and the principle that collections should not normally be regarded as financially-negotiable assets.

6.14

Consider financially-motivated disposal only in exceptional circumstances and when it can be demonstrated that:

- it will significantly improve the long-term public benefit derived from the remaining collection
- it is not to generate short-term revenue (for example to meet a budget deficit)
- it is as a last resort after other sources of funding have been thoroughly explored
- extensive prior consultation with sector bodies has been undertaken
- the item under consideration lies outside the museum's established core collection as defined in the collections policy.

6.15

Ring-fence any money raised as a result of disposal through sale, if this exceptional circumstance arises, solely and directly for the benefit of the museum's collection. Money raised must be restricted to the long-term sustainability, use and development of the collection. If in doubt about the proposed use of such restricted funds consult sector bodies.

6.16

Openly communicate and document all disposals and the basis on which decisions to dispose were made.

6.17

Apply any money received in compensation for the loss, damage or destruction of objects in the collection solely and directly for the benefit of the museum's collection.

6.18

Respond to requests for return of human remains, and other culturally sensitive material with understanding and respect for communities of origin. (See DCMS guidance on human remains.)

For additional, more detailed guidance on all aspects of disposal see the MA Disposal toolkit.

7

Society can expect museums to:

Recognise the interests of people who made, used, owned, collected or gave items in the collections

7.0

Museums try to develop constructive relationships with people who contributed to collections, with representatives of these people, their heirs and cultural descendants, balancing responsibilities to a range of stakeholders. Gifts and bequests of items are usually made in the expectation that items will be preserved. Museums reconcile the wider public interest with that expectation.

All those who work for or govern museums should ensure that they:

7.1

Acknowledge that the museum benefits from all those who have contributed to the making, meaning and presence in the museum of its collections. Establish working relationships based on mutual understanding, wherever practical.

7.2

Establish principles that assist people who contributed to collections to develop mutually agreed arrangements with the museum, wherever practical. Specify and record these arrangements clearly and unambiguously.

7.3

Articulate clearly intentions and expectations about projects such as commissions, collaborations and workshops. Specify agreements over matters such as funding, copyright, site preparation and maintenance. Make written exhibition policies available to exhibitors. (See also section 4, Consult and involve communities, users and supporters.)

7.4

Inform originating communities of the presence of items relevant to them in the museum's collections, wherever practical.

7.5

Respect the interests of originating communities with regard to elements of their cultural heritage present or represented in the museum. Involve originating communities, wherever practical, in decisions about how the museum stores, researches, presents or otherwise uses collections and information about them.

7.6

Consider restricting access to certain specified items, particularly those of ceremonial or religious importance, where unrestricted access may cause offence or distress to actual or cultural descendants. (See also section 3, Encourage people to explore collections for inspiration, learning and enjoyment.)

7.7

Deal sensitively and promptly with requests for repatriation both within the UK and from abroad of items in the museum's collection, taking into account: the law; current thinking on the subject; the interests of actual and cultural descendants; the strength of claimants' relationship to the items; their scientific, educational, cultural and historical importance; their future treatment. Refer to DCMS Guidelines on Human Remains on Restitution and Repatriation issued by Resource, the Council for Museums, Archives and Libraries and guidelines on human remains issued by the Museum Ethnographers Group. Refer to any subsequent guidance issued by the bodies and their successors listed above. (See also section 6, Safeguard the long-term public interest in the collections.)

7.8

Exercise sensitivity and seek professional advice whenever acquiring items from fieldwork. Consider always the desirability of recording and preserving items where they are. Uphold guidelines issued by relevant bodies.

7.9

Exercise sensitivity and seek professional advice whenever reminiscence and oral history work is undertaken. Uphold guidelines issued by relevant bodies.

7.10

Follow up accepted gifts or bequests with a written acknowledgement and confirmation of the terms on which the gift or bequest is being accepted. (See also section 5, Acquire items honestly and responsibly and the MA's ethical guidelines on acquisition.)

7.11

Uphold and comply with conditions set by benefactors and accepted by the museum, unless changed circumstances mean that conditions need to be reconsidered in the light of what is generally held to be the public interest.

8

Society can expect museums to:

Support the protection of natural and human environments

8.0

Collections in museums represent the rich diversity of the world's natural and human environments. Museums promote learning without jeopardising this diversity. They contribute to sustainable economic activity and benefit local and wider communities.

All those who work for or govern museums should ensure that they:

8.1

Value and protect natural and human environments. Prevent abuse of places of scientific, historic or cultural importance. Exercise due diligence procedures when acquiring or borrowing items. Uphold appropriate national and international conventions and treaties on protection of natural and human environments, whether or not they have been ratified. (See section 5, Acquire items honestly and responsibly.)

8.2

Be sensitive to the impact of the museum and its visitors on natural and human environments. Make best use of resources, use energy and materials responsibly and minimise waste.

8.3

Contribute to the sustainable social and material vitality of the museum's surrounding area by, for example, attracting users, sustaining economic activity, offering satisfying and rewarding employment and pursuing local purchasing policies.

8.4

Develop purchasing and resale policies that address environmental and human rights' issues.

8.5

Make all growth sustainable. Evaluate the long-term impact of introducing, operating and maintaining new developments.

9

Society can expect museums to:

Research, share and interpret information related to collections, reflecting diverse views

9.0

Museums facilitate and carry out research. They share and interpret information consistent with their purpose and ensure that it is accurate, up to date and based on the highest standards of scholarship and research. They organise and manage information to make it accessible. Museums interpret information to engage a wide variety of interests and to reflect diverse views. They invite users to question assumptions and distinguish evidence from speculation.

All those who work for or govern museums should ensure that they:

9.1

Research and collate information about collections and the subject areas generally within which the museum has expertise. Enable the museum's researchers and others to keep up to date with developments in their field.

9.2

Apply the highest possible standards of objectivity to the research undertaken by the museum, and distinguish clearly between evidence and deduction. Maintain, as far as possible, records and material so that the evidence on which research is based can be re-examined and verified independently.

9.3

Make information publicly accessible. Conduct research with the intention of making it public. Publish research promptly and make it widely available. (See also section 3, Encourage people to explore collections for inspiration, learning and enjoyment.)

9.4

Develop mechanisms that encourage people to research collections, develop their own ideas about them and participate in a variety of ways in shaping the interpretations offered by the museum. Make the museum a forum in which ideas can be discussed and tested. (See also section 3, Encourage people to explore collections for inspiration, learning and enjoyment.)

9.5

Cultivate a variety of perspectives on the collections to reflect the diversity of the communities served by the museum.

9.6

Represent ideas, personalities, events and communities with sensitivity and respect. Recognise the humanity of all people. Develop procedures that allow people to define, and seek recognition of, their own cultural identity. (See also section 7, Recognise the interests of people who made, used, owned, collected or gave items in the collections.)

9.7

Respect the views of others and their right to express those views, unless illegal to do so or inconsistent with the purpose of museums as socially-inclusive institutions. Strive to dispel prejudice and indicate clearly the part played by opinion or conjecture in interpretation.

9.8

Reflect differing views striking a balance over time.

9.9

Recognise the assumptions on which interpretation is based and that presentational styles may shape perception in unintended ways. Consider carefully the impact of interpretations that exclude any reference to people associated with the items.

9.10

Strive for editorial integrity and remain alert to the pressure that can be exerted by particular interest groups, including lenders and funders (see also 10.12).

9.11

Keep records and presentations as accurate and up to date as possible. Record differences of expert opinion. Correct errors in documentation or presentations without delay, when they are brought to light.

10

Society can expect museums to:

Review performance to innovate and improve

10.0
Museums develop by initiating and responding to change. They establish, formally adopt, publish and regularly review their aims and objectives. Museums specify targets, monitor, evaluate and report on performance and make changes in operational practices to become more effective and efficient.

All those who work for or govern museums should ensure that they:

10.1
Adhere to the museum's constitution. Review, periodically, the museum's overarching purpose.

10.2
Keep up to date with developments in the law, museum practice, social policy and public expectations.

10.3
Directly involve users, staff, members of the governing body and other stakeholders in planning. Regularly update and make public the museum's aims, objectives, plans, policies and standards. (See also section 4, Consult and involve communities, users and supporters.)

10.4
Make prudent use of resources and maximise the benefit that the public derives from all activities. Account fully and openly to the public about how money is raised and spent.

10.5
Maintain the financial viability of the museum. Meet legal, constitutional and contractual requirements for financial control of the museum (and any subsidiary commercial companies). Avoid unjustifiable financial risk. (See also section 1, Hold collections in trust on behalf of society.)

10.6
Accept financial support from commercial organisations and other outside sources provided that it does not compromise the integrity of the museum. Clearly define and agree the relationship between the museum and its partners to avoid undue influence on museum activities.

10.7
Establish principles to inform trading and commercial activities so that they are consistent with the aims of the museum and, where possible, enhance the quality of the service. Do not allow trading and commercial activities to bring the museum into disrepute, reduce public access, subject the collections to unacceptable risk or jeopardise finances.

10.8
Make the museum's premises as suitable as possible for public services, collections management and access for all, in addition to fulfilling legal responsibilities for the health and safety of staff and visitors.

10.9
Recruit, train and develop individuals so that the skills and knowledge of members of museum staff, the governing body and support groups are appropriate to the needs of the individual and the museum. Facilitate the career-long professional and personal development of all staff and members of the governing body.

10.10
Recognise that all who work for the museum in any capacity have a contribution to make to its successful operation. Recruit and treat all staff fairly. Acknowledge the contributions of colleagues at all levels.

10.11
Undertake and delegate only such duties as are commensurate with individual knowledge and skills. Co-operate fully with any appropriate scrutiny, appraisal or evaluation. Seek and act on advice, whenever necessary, from colleagues in other museums, museum support bodies and consultants. Obtain, when necessary, specialist expertise through contracts or consultancies. (See also section 4, Consult and involve communities, users and supporters.)

10.12
Assist the governing body in making informed decisions and obtaining direct access to the advice it needs to fulfil its role.

10.13
Strive to increase the diversity of staff and members of the governing body so that they adequately represent the museum's present and potential audience.

10.14
Conduct disputes with others with courtesy and tolerance, even when differences of opinion are robustly expressed. Avoid giving needless personal offence. Seek independent arbitration, mediation or other means of resolution when disputes cannot otherwise be resolved.

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How to use this index

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If, for example, you are developing an access policy, or dealing with an ethical dilemma around an access issue, then section 3, Encourage people to explore collections for inspiration, learning and enjoyment, is clearly the most important section. Access issues are also referred to in other sections, reference to which can be found by looking up the word 'access' in the index.

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The seven principles of public life

The MA endorses the seven principles of public life, as set out in Standards in Public Life: the First Report of the Committee on Standards in Public Life (1995), chaired by Lord Nolan. The principles apply to all who work in or for museums and to all who serve on museum governing bodies.

Selflessness

Holders of public office should take decisions solely in terms of the public interest. They should not do so in order to gain financial or other material benefits for themselves, their families or their friends.

Integrity

Holders of public office should not place themselves under any financial or other obligation to outside individuals or organisations that might influence them in the performance of their official duties.

Objectivity

In carrying out public business, including making public appointments, awarding contracts, or recommending individuals for rewards or benefits, holders of public office should make choices on merit.

Accountability

Holders of public office are accountable for their decisions and actions to the public and must submit themselves to whatever scrutiny is appropriate to their office.

Openness

Holders of public office should be as open as possible about all the decisions and actions that they take. They should give reasons for their decisions and restrict information only when the wider public interest clearly demands.

Honesty

Holders of public office have a duty to declare any private interests relating to their public duties and to take steps to resolve any conflicts arising in a way that protects the public interest.

Leadership

Holders of public office should promote and support these principles by leadership and example.

Information on how to use the principles outlined above to inform the work of governing bodies is available from the Trustee and Governance Team at the National Council For Voluntary Organisations (NCVO), Regents Wharf, 8 All Saints Street, London N1 9RL
www.ncvo-vol.org.uk
Help desk tel: 0800 2798 798

Society can expect museums to:

1 Hold collections in trust on behalf of society

Museums behave as ethical guardians as well as owners of collections. They never relinquish the trust invested in them, without public consent.

2 Focus on public service

Museums belong to everybody. They exist to serve the public. They should enhance the quality of life of everyone, both today and in the future. They are funded because of their positive social, cultural, educational and economic impact.

3 Encourage people to explore collections for inspiration, learning and enjoyment

Museums have the generosity of spirit to be approachable at every point of contact, to reach out to audiences and to increase access to their collections. As educational institutions, museums encourage a participative approach to learning. However specialised their subjects or remote their locations, they develop new audiences and deepen relationships with existing users. Museums recognise that individuals have varied backgrounds and varying physical, intellectual and cultural needs and expectations.

4 Consult and involve communities, users and supporters

Museums seek the views of communities, users and supporters and value the contributions they make. Museums actively involve them in developing policy, and balance this with the role of museums in leading and promoting debate. Museums engage with changing needs and values.

5 Acquire items honestly and responsibly

Museums develop collections using long-term plans that are socially responsive. They reject items with dubious provenance. Museums regularly review, publish and adhere to acquisition policies agreed by the governing body that are realistic in terms of the resources required to sustain them. These policies address issues of the context and legitimacy of acquisitions, due diligence, long-term care, documentation and relevance to overriding, institutional aims. Items are acquired on the basis that they will be retained in the public domain.

6 Safeguard the long-term public interest in the collections

Collections are a tangible link between the past, present and future. Museums balance the interests of different generations by safeguarding collections, which may include buildings and sites.

Museums develop and implement a collections policy in order to ensure appropriate standards of care and security for all items entrusted to them, either permanently or on loan.

Museums meet their responsibility to future generations by ensuring that collections are well managed and sustainable. There is a strong presumption in favour of the retention of items within the public domain. Sometimes transfer within the public domain, or another form of disposal, can improve access to, or the use, care or context of, items or collections. Responsible, curatorially-motivated disposal takes place as part of a museum's long-term collections policy, in order to increase public benefit derived from museum collections.

7 Recognise the interests of people who made, used, owned, collected or gave items in the collections

Museums try to develop constructive relationships with people who contributed to collections, with representatives of these people, their heirs and cultural descendants, balancing responsibilities to a range of stakeholders. Gifts and bequests of items are usually made in the expectation that items will be preserved. Museums reconcile the wider public interest with that expectation.

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Collections in museums represent the rich diversity of the world's natural and human environments. Museums promote learning without jeopardising this diversity. They contribute to sustainable economic activity and benefit local and wider communities.

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Accreditation Scheme for Museums and Galleries in the United Kingdom: Accreditation Standard

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Introduction

Accreditation is the UK standard for museums and galleries. It defines good practice and identifies agreed standards, thereby encouraging development. It is a baseline quality standard that helps guide museums to be the best they can be, for current and future users.

This document sets out the requirements museums must meet to gain Accreditation. Although it is a national standard, it is not a 'one size fits all' standard. For each requirement, the expectations vary for museums of different types, sizes and scopes. This is made clear in the assessment guidance document, which you should read alongside this document.

Aims of the Accreditation Scheme

1. 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
2. To encourage confidence in museums as organisations that manage collections for the benefit of society and manage public funds appropriately.
3. To reinforce a shared ethical and professional basis for all museums.

Benefits of taking part in the Accreditation Scheme

Performance

A quality standard that serves as an authoritative benchmark for assessing performance, rewarding achievement and driving improvement.

Profile

It raises awareness and understanding of museums, so building confidence and credibility both within the governing body and among the public.

People

It helps museums to improve their focus on meeting users' needs and interests and developing their workforce.

Partnerships

It helps museums to examine their services and to encourage joint working within and between organisations.

Planning

It helps with forward planning by formalising procedures and policies.

Patronage

It demonstrates that the museum has met a national standard, which strengthens applications for public and private funding and gives investors confidence in the organisation.

These benefits were put forward in a report commissioned in 2011 by the Museums Libraries and Archives Council (MLA) and The National Archives (TNA). The report was written by Janice Tullock and Katrina Thomson, consultants, to develop thinking about an Accreditation Scheme for archives.

Eligibility

To be Accredited, museums must:

- meet the Museums Association's 1998 definition of a museum ('Museums enable people to explore collections for inspiration, learning and enjoyment. They are institutions that collect, safeguard and make accessible artefacts and specimens, which they hold in trust for society')
- hold a long-term collection of artefacts
- have a formal constitution
- provide two years of relevant accounts
- make sure that they meet all relevant legal, ethical, safety, equality, environmental and planning requirements
- be committed to forward planning to improve the service for users

Requirements for Accreditation

1 Organisational health

'Accredited museums are responsible, responsive and resilient.'

1.1 Clear statement of purpose

The museum must be guided by a statement of purpose that defines why the museum exists and who it is for.

1.2 Acceptable constitution for the governing body

The museum must be a long-term organisation that exists to benefit the public and protect collections. It must have an appropriate and acceptable constitution for the governing body.

1.3 Appropriate management arrangements

The museum must be an effective organisation that is well managed and able to provide evidence of the following:

- 1.3.1 that it has a satisfactory management structure, from the governing body to the user
- 1.3.2 that it has formally approved any authorities or responsibilities the governing body has delegated to sub-committees, members of staff or volunteers
- 1.3.3 that the management structure makes sure there is appropriate professional input into decision making and policy development
- 1.3.4 that succession procedures are sufficient to ensure business continuity and accountability
- 1.3.5 the person or organisation that has powers to approve documents such as the forward plan and policies on managing collections
- 1.3.6 any approved agreement under which a separate organisation runs the museum

1.4 Effective forward planning

The museum must plan effectively for long-term success and to make sure it can adapt in a changing environment in order to survive. Its approved forward plans must include or cover the following:

- 1.4.1** the museum's statement of purpose
- 1.4.2** a review of the previous forward plan
- 1.4.3** an analysis of the environment in which it exists
- 1.4.4** consultation and an analysis of views
- 1.4.5** its key aims
- 1.4.6** the specific objectives beneath each key aim
- 1.4.7** how it will achieve its objectives
- 1.4.8** a resource plan showing the people and money available to meet its objectives
- 1.4.9** the date the plan will be reviewed

1.5 Secure occupancy of all premises containing collections

The terms under which the museum occupies the buildings or sites must be long-term (usually at least 12 months) and be sufficient to keep the collections secure and allow effective forward planning.

1.6 Demonstration of financial basis

The museum must be able to show that it is financially stable and that it meets the relevant financial regulations or standards and the requirements of its constitution.

The museum must have enough funds available, and collections must not be used as security for a loan.

1.7 Appropriate workforce, in numbers and experience, for the museum's responsibilities and plans

The museum must have an appropriate workforce to run it effectively. It must have effective employment procedures and roles in place to meet its responsibilities. The museum must have:

- 1.7.1** an appropriate workforce
- 1.7.2** clear agreements for each member of the workforce, setting out their roles and responsibilities
- 1.7.3** formal induction procedures for new recruits to ensure that all members of the workforce have basic information about the museum and understand their role in it
- 1.7.4** appropriate development opportunities for its workforce

1.8 Access to professional advice and input to policy development and decision making

The museum's governing body must have access to advice and guidance from a museum professional. If the museum does not employ a museum professional, it must have a written agreement between itself and a museum mentor.

1.9 Clear, workable emergency plan

The museum must be able to respond effectively to emergency or disaster situations. It must have an emergency plan, relating to all buildings that house collections and services, which includes or refers to:

- 1.9.1** arrangements for the workforce, visitors and collections
- 1.9.2** risk assessments of threats
- 1.9.3** information about how emergency plans are authorised, maintained, communicated, tested and made available to the workforce and emergency services
- 1.9.4** evidence of how the museum works with the emergency services, and of any other relevant emergency plans
- 1.9.5** an effective procedure for reviewing the emergency plan

1.10 Organisational approach to environmental sustainability

The museum must be environmentally conscious. Its approach to minimising waste and reducing its effect on the environment is a matter for the governing body.

The museum must be guided by a policy statement about its approach to environmental sustainability, and that policy statement must be appropriate to its statement of purpose.

2 Collections

‘Accredited museums manage collections effectively and make them and the information they hold about them available to everyone.’

Collections within a museum must be managed in line with the museum’s statement of purpose, policies and strategic vision.

2.1 Satisfactory arrangements for the ownership of collections

The museum must take responsibility for all the collections it manages.

The museum must be able to provide information on the size of the collections and the proportion of the collections owned by and on loan to it. Any risks relating to collections on loan to the museum should be dealt with through forward planning.

Collections management policies

2.2 Development policy

The museum must have an approved policy for developing collections (also known as an acquisition and disposal policy). The policy must include:

- 2.2.1** the statement of purpose
- 2.2.2** an overview of current collections
- 2.2.3** themes and priorities for future collecting
- 2.2.4** themes and priorities for rationalisation and disposal
- 2.2.5** information about the legal and ethical framework for acquisition and disposal of items

2.3 Documentation policy

The museum must be guided by a documentation policy statement. This may be part of a wider collections information policy.

2.4 Care and conservation policy

The museum must have an approved policy statement to guide its approach to collections care and conservation.

Collections management plans

2.5 Documentation plan

The museum must have plans to improve its collections documentation and documentation systems.

2.6 Care and conservation plan

The museum must have plans to help deliver improvements to collections care and conservation in line with the collections care and conservation policy.

Collections management procedures

2.7 Documentation procedures

The primary SPECTRUM procedures must be in place in the form of a documentation procedural manual that is available for inspection on request.

2.8 Expert assessment of security arrangements

The museum must obtain expert security advice for stored and exhibited collections at least every five years, and earlier if needed. It must plan to act on the advice over time.

3 Users and their experiences

'Accredited museums are welcoming and accessible. They exhibit collections and have a planned approach to identifying and providing a good-quality service for a broad range of users.'

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.

The museum must do the following:

- 3.1.1** understand who its users and non-users are
- 3.1.2** evaluate and analyse information to assess users' needs
- 3.1.3** devise plans to broaden its range of users
- 3.1.4** have a culture of customer care with arrangements in place to make sure all users are treated with courtesy and care
- 3.1.5** take account of users' needs, guided by a policy statement setting out a commitment to give everyone access to collections and associated information
- 3.1.6** respond to tourism and local priorities where appropriate

3.2 User-focused experience

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

The museum must:

- 3.2.1** have adequate and accessible facilities to meet the needs of the expected number and range of users or provide information about nearby facilities
- 3.2.2** have appropriate signs and directions inside and outside the building
- 3.2.3** communicate effectively with users and potential users through a range of accessible marketing and promotional activities

3.3 Effective learning experiences

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

The museum must:

- 3.3.1** exhibit the collections using a variety of interpretative methods
- 3.3.2** provide access to the collections and associated information for research purposes and other forms of engagement
- 3.3.3** provide effective and stimulating learning and discovery experiences focused on the collections

Further information

The Accreditation Committee

The Accreditation Scheme is overseen by the Accreditation Committee, whose members are senior museum and gallery professionals. The members bring a broad spread of knowledge and expertise relating to museums of all types throughout the UK. Accreditation Panels, which are sub-groups of the committee, meet approximately six times a year to consider applications and returns. These decisions are reviewed at annual Accreditation Committee meetings.

The assessing organisations

The organisations that assess museums for Accreditation are:

- **England, Isle of Man and Channel Islands** Arts Council England, www.artscouncil.org.uk
- **Wales** CyMAL: Museums Archives and Libraries Wales (a division of the Welsh Government), www.wales.gov.uk/topics/cultureandsport/museumsarchiveslibraries
- **Scotland** Museums Galleries Scotland, www.museumsgalleriesscotland.org.uk
- **Northern Ireland** Northern Ireland Museums Council, www.nimc.co.uk
- **National museums** Arts Council England, www.artscouncil.org.uk

These organisations assess each museum's application or return. The assessments are passed to the Accreditation Secretariat at Arts Council England, where they are processed, quality assured and scheduled to be presented to an Accreditation Panel.

Additional information about Accreditation is available on the website of each assessing organisation.

Keeping Accredited status

Once a museum has been awarded Accredited status, it must prove that it continues to meet the requirements of the scheme by sending an Accreditation return to the assessing organisation every two to three years, as required.

Changes to the Accreditation standard

Over time, the requirements for the Accreditation standard may change to make sure they remain up to date with developments in the sector and in line with current practice. When changes are made, all Accredited museums will be given reasonable notice of the changes before they are expected to meet the revised requirements.

Changes to Accredited status

If a museum stops meeting the Accreditation requirements, the museum's status may be reduced to 'provisional' or it may lose its Accreditation status altogether. This decision would be taken by an Accreditation Panel after discussing the matter with the museum and the relevant assessing organisation.

If a museum fails to provide their Accreditation returns within the timescale allowed it may lose its Accreditation status.

A museum can ask to be removed from the Accreditation scheme.

Glossary

Access – usually seen in terms of identifying barriers that prevent participation and developing strategies to dismantle them. Barriers come in many forms and may be physical, sensory, intellectual, attitudinal, social, cultural or financial.

Accessible – includes all forms of access – being open to visitors, by appointment, to specific user groups, virtual access, etc.

Acquisition – the process of legally acquiring an item for the long-term collection.

Approval – means that the governing body or delegated authority has made a policy decision to support a proposal and this has been ratified and recorded.

Collection – a body of cultural and heritage material. Collections may be physical, non-tangible or digital.

Collections management – the organisational approach to balancing collections development, care, access and information.

Conservation – methods of care or intervention applied to an item with the aim of slowing the process of degradation and extending the item's life.

Constitution – a legal set of fundamental principles according to which an organisation is governed.

Consultation – formal or informal methods of finding out what users and non-users think, want or need.

Disposal – the process of removing an item from the museum's long-term accessioned collection.

Documentation – the information records about collection items.

Environmental sustainability – how a museum uses its resources responsibly to minimise its detrimental impact on the natural world.

Forward plan – a forward-looking document that sets out the detailed aims and objectives of an organisation, to be achieved within a defined planning cycle. It is sometimes called a business plan.

Forward planning – a considered way of setting strategic direction and overarching ambition by taking stock and prioritising work in line with the organisation's statement of purpose and in consultation with its stakeholders. **Page 58** aligning resources with objectives.

Induction procedures – the formalised process of informing everyone with a role in the museum all about the museum, its purpose and priorities.

Interpretative methods – the way in which ideas and information about the collections are communicated to users.

Key aims – these are the overarching priorities for the museum to deliver the statement of purpose.

Learning – includes both formal and informal learning. It may involve the development or deepening of skills, knowledge, understanding, awareness, values, ideas and feelings, or an increase in the capacity to reflect.

Museum mentors – museum professionals supporting the achievement of Accreditation by smaller, volunteer-run museums.

Non-users – people who do not currently make use of the museum.

Objectives – the tasks that ensure key aims are achieved. They should be SMART – that is, specific, measurable, achievable, relevant and time bound.

Occupancy – the formal terms under which an organisation is based in a building or on a site.

Policies – approved documents or statements that provide strategic direction for the organisation.

Procedures – define standardised processes. They are a practical operational guide and may also be called manuals, handbooks, instructions, etc.

Professional – with a suitable qualification supported by recent relevant experience.

Rationalisation – the process of refining a collection in line with the museum's statement of purpose.

Resilience – the long-term viability of an organisation to survive and adapt in a changing environment.

Resource plan – identifies and quantifies the people and money available to realise objectives within the current forward plan. The resource plan should cover the same years as the forward plan even if figures for years other than the current one are only indicative.

Risk – combination of threat and likelihood of it occurring. Risk is the potential for a chosen action or activity (including the choice of inaction) to lead to a loss.

Sustainable – capacity of the museum for long-term survival as an organisation.

SPECTRUM – the industry standard for collections management, defining agreed procedures for: object entry; acquisition; location and movement control; cataloguing; object exit; loans out and loans in.

Statement of purpose – defines why the museum exists and who it is for. The statement of purpose may be found within the museum's governance document.

Succession procedures – an agreed set of processes to ensure the business continuity and accountability through changes of leadership or of key members of the workforce.

Users – individuals and groups who make use of the museum's resources or facilities in some way.

Workforce – the people, both paid and unpaid, who work at the museum.

Supporting partners:





Saffron Walden Museum



Museum Service Forward Plan 2013 - 2018

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Approved by Museum Management Working Group 8 May 2013

Due for Review in November 2014

Executive Summary

1. Saffron Walden Museum is the accredited public museum service for Uttlesford District, north-west Essex. It is operated by Uttlesford District Council under the terms of a lease and a management agreement with Saffron Walden Museum Society Ltd (charity 1123209) which owns the buildings on the Museum Street site and the collections.
2. The current buildings need improving for the efficient operation of the service, especially in terms of storage, management and display of collections. This affects the use of collections in exhibition and other services which could attract more visitors.
3. Income could be improved by a better shop and hiring out the new learning & activity room. Commercial letting of other Museum buildings could provide new income streams if they could be released from Museum use.
4. The need to replace the current off-site store with a better building of greater capacity is paramount. Other priorities are improving the use of computers, updating the collections database and re-displaying core local collections of human history.
5. The Council budget and staffing of the Museum are decreasing, which presents a challenge if a basic service is to be maintained while undertaking improvements. The Museum Society already contributes towards costs, principally those relating to collections, and as a charity provides a means of fund-raising. It is reviewing how it can best support improvements to and the operation of the Museum.
6. The Museum can enhance people's 'sense of place' and community identity in Uttlesford. It can both contribute to and benefit from the Council's plans to improve the neighbouring castle ruins as a heritage attraction.
7. The Forward Plan addresses this through six key aims within a two-Stage framework
Stage I 2013-2014 New store, relieving pressure on the Museum for improvement
Stage II 2014-2018 Extension of the Museum including new displays
8. The Key Aims are:
 1. Improve and rationalise the storage of collections in off-site storage and in the Museum, through the construction of a new off-site store and a revised collections policy [Stage I]
 2. Improve management, accessibility and display of collections by developing the collections database [Stage I and Stage II]
 3. Extend and reorganise the Museum building to improve its displays and facilities for visitors, staff and volunteers, researchers and visiting groups (school and other) [Stage II]
 4. Improve interpretation and use of the Museum and castle site [Stage II]
 5. Maximise community involvement through appropriate opportunities to contribute to the Museum Service [Stage II]
 6. Develop a marketing policy for the Museum and site as a local amenity and heritage destination to local and wider audiences, to increase use, income and community well-being [Stage II]
8. The principle resources required will be:
Stage I Existing Council and Museum Society funds for new store (balance retained from the former Heritage Quest Centre project)
Stage II Application to the Heritage Lottery Fund and other grant-aiding bodies

1 Statement of Purpose

The Museum Service's aim as the public museum service for Uttlesford district is

To give people inspiration and a sense of place in Uttlesford district / north-west Essex, through exploration of our wide-ranging collections and the histories they represent

The key purpose of the 2013 – 2018 Forward Plan is

To improve public use of and benefit from all the Museum's collections, whether on display, in store or on-line,

in order to contribute to the Museum's long-term sustainability and development through increased use, income and public support.

2 A Brief History of the Museum and a Review of the Previous Forward Plan (2006 – 2011)

2.1 Brief History of the Museum

a) Origins

The Museum was founded by Saffron Walden Natural History Society and opened in 1835 in the Museum building, which is among the earliest purpose-built local museums and is a grade II listed building. It belongs to the earliest generation of local museums and from the beginning its collections reflected the wide-ranging ambitions of its original trustees and benefactors to 'bring the world to Walden' and showcase the diversity of the natural and human world, as well as collections of local origin from north-west Essex and the surrounding region. The collections were curated by Society members until the appointment of the first salaried curator in 1880.

b) Collections

Today, the Museum has a dual focus in its collections: to present the human history and natural environment of north-west Essex (Uttlesford district) and to present important specific non-local collections which are a legacy of its founders' vision – principally world cultures, ceramics & glass and Egyptology, and some significant non-local and non-British specimens in the natural science collections.

c) Site and Buildings

The site on which the Museum is located is the inner bailey area of Walden castle, of which the ruined Norman keep survives nearby; it is not part of the Museum Service, being owned and managed by Uttlesford District Council directly. The whole inner bailey site, including Museum and Council land and the Castle Hill Tennis Club, is a Scheduled Ancient Monument, and the site sits within the conservation area of Saffron Walden's historic town centre.

Other buildings on site which belong to the Museum are the single-storey Museum Street School building, which houses a small schoolroom, conservation laboratory and a storeroom, and a Workshop (prefabricated garage) in which are kept tools, paints and materials such as MDF; showcases for temporary exhibitions and two chest freezers for conservation and natural history deadstock. For many years the Museum used the Town Hall attics and the stable block at Audley End House for storage of collections, including

horse-drawn vehicles. In the early 1990s these premises had to be vacated, so a small unit at the Council's Newport Depot was fitted out as an interim storage facility. It was unable to take all the larger objects, so four horse-drawn vehicles have since been stored at Hempstead by a member of the Museum Society who now wants them to be removed.

d) Governance

Saffron Walden Museum Society Ltd is the direct successor of Saffron Walden Natural History Society and is a registered charity. It owns the Museum buildings (except the off-site store at Newport) and the collections, and ran the Museum Service with the aid of various grants until the 1970s when the newly-formed Uttlesford District Council took over responsibility for running the Museum Service, with the buildings and collections on lease to the Council. Under the current management agreement for the Service, the Council is responsible for providing staff and revenue budgets, while the Society uses its charitable status to help raise funds for capital projects, and applies interest from invested funds to purchases and other special projects for the collections.

In recent years, with public service budgets under pressure, funding from the Council has declined and the Society is now being asked to supplement its support. Other ways of increasing income are under constant scrutiny, however within the restrictions imposed by the current buildings and reduced staffing, little can be achieved in this direction without some fundamental investment and changes.

For the governance structure of the Museum Service today, see

Appendix 1 Organisational Chart, Uttlesford District Council Corporate Services / Museum Service

Appendix 2 Governance Structure for the Museum Service: Uttlesford District Council and Saffron Walden Museum Society Ltd

2.2 Review of Previous Forward Plan 2006 - 2011

The Museum Service Forward Plan 2006 – 2011 sought to address issues restricting service capacity and use in 2 stages:

Stage 1: the Heritage Quest Centre project 2007 – 2010 to build a new resource centre (off-site storage facility with activity room and public access on some days) on a Council-owned site on the Thaxted Road, Saffron Walden. There would have been two additional collections / documentation staff and one outreach officer for three years, funded by the project. The purpose was to address lack of storage for collections and improve documentation on computer so that more use could be made of the collections to attract interest and through provision of outreach services across the district. An extensive Audience Development study (by consultants ABL, 2005) formed part of the successful HLF application. This project would pave the way for:

Stage 2: Improvement of the Museum site (including the castle ruins), with the extension of the building and displays. This stage would seek to improve the Museum's performance as a local cultural amenity and visitor attraction, providing more opportunities to increase income and support.

The application to the HLF was submitted in 2007 and the Heritage Quest Centre (HQC) project began in 2008 but a number of issues, especially the nature of the land and increasing budgetary pressures over time, contributed to the withdrawal of the project late

in 2011. However the Heritage Lottery Fund indicated that it would be willing to consider future proposals for improvements to the Museum (Stage 2) at a later date. Meanwhile, although HLF and other major grants for the HQC were lost, the Museum Society was able to retain money from fund-raising events and local donors to put towards a more basic store, together with some project funding retained by the Council.

In 2012, all other options to build a storage facility on an alternative site on the Thaxted Road were ruled out and a search commenced for an alternative storage solution, either the conversion of an existing building or the acquisition of a site for a new-build store. Despite extensive efforts by Council officers and the Society, it proved difficult to find a suitable and affordable site, but by early 2013 a new proposal for a site in Saffron Walden was under consideration and with the previous Forward Plan already out-of-date, it was necessary to re-focus and look to the future.

3 Analysis of the Environment

This section summarises the main challenges and opportunities facing the Museum Service from a more extensive analysis in **Appendix 3**, which comprises:

1. A 'snapshot' of the Museum Service – its collections, buildings, human resources and current budget
2. A brief appraisal of the Museum Service (SWOT)
3. A broader consideration of the environment in which the Museum Service now operates (PESTEL)

The principle points are:

The museum sector

- The Museum sector and related organisations, regionally and nationally, are undergoing changes resulting from re-structuring and budget reductions. The nature of the local and regional framework in which museums like Saffron Walden will be operating over the next five years is still not entirely clear. The challenge for local museum services is to find the resources to realise the potential of their collections and services in tangible public benefits.

Improving Buildings, Efficient Working and Income Generation

- The off-site (Newport Depot) is overcrowded, lacks computers and other facilities and needs replacing with a larger facility better-suited for museum purposes if the collections are to be managed and used effectively. In particular, more storage space is needed to update the archaeology collections with the results of recent excavations and to provide space for the research and rationalisation of existing collections.
- The Museum building (opened 1835) is in need of extension and improvements to meet twenty-first century needs. Store and workspace behind the scenes is cramped, visitor facilities and galleries need improving.
- Improvements to the Museum could increase income, especially from a better shop, and from hiring out the new learning & activity room for meetings and private functions.

- Facilities and the work of staff are currently spread between three buildings on site (Museum, Schoolroom, Workshop) but with reduced staff levels, efficient and safe operation of the service requires these functions to be condensed into one building.
- The difficulties of attracting casual visitors to the site, which is uphill from the town centre, would be assisted by developing its potential as a historical attraction, through the Council's plans for the castle ruins.

Collections and displays

- The potential of the Museum's extensive collections could be realised to better effect through extended and re-displayed gallery space, the priority being the local history and archaeology of the district (galleries dating from 1980s-90s).
- The phased withdrawal 2013-15 from the world cultures (ethnography) gallery of a number of exhibits on loan from the Cuming Museum will also create an opportunity for re-display of this collection, focusing on the stories of local collectors and their links with other parts of the world.

IT and information on the collections

- A review of the Museum's IT system is needed, to make it 'fit for purpose' for the Forward Plan, especially regarding the management and use of the collections database and public access to information in the galleries

Activities and Learning opportunities

- There is potential to increase and extend learning services, both formal session for schools and informal learning opportunities for adults and families, with the Museum's unique selling-point: access to collections. This would increase visitors and income, but requires a bigger learning & activity room and more staff-time.

Resources (human resources and budgets)

- The reduction in the Museum Service budget to £160,000 by 2015/16 and correspondingly smaller core team of staff will significantly affect the Museum's capacity to embark on large-scale improvement plans or run more than a minimal service. Funding applications will need to cover costs of project-funded curatorial and outreach staff especially if progress is to be made with addressing collections management and display backlogs.
- Retention of Accredited status (government standard for public museums) is necessary or desirable to attract grant-aid and public confidence. Addressing collections storage and documentation backlogs forms part of the Accreditation standard.
- The Museum benefits from the support of Saffron Walden Museum Society Ltd, which uses its charitable status for fund-raising and income from investments to support the Museum, principally in relation to the collections (which the Society owns). The Society may be able to increase financial support by encouraging private philanthropy and possibly some business sponsorship, although analysis and experience suggest that there is relatively little scope for significant business sponsorship in the area.
- Volunteers are already a great resource, assisting with many aspects of the Museum's work, but scope for making more use of volunteers behind-the-scenes is hampered by lack of space and lack of curatorial staff to run and supervise suitable projects without being distracted from other essential work.

Energy Efficiency

- The provision of a new store and the extension and refurbishment of the Museum would both provide the opportunity to improve energy efficiency, in support of the Council's environmental policy, and minimise energy costs.

Supporting Localism and a 'sense of place'

- As a Community Asset and the Council's only heritage and cultural amenity, the Museum can provide a 'sense of place' to residents and visitors in Uttlesford and a focus for community identity. Public consultation and the need to prioritise re-display of the local history and archaeology galleries links with this, as do opportunities to involve the community for example through volunteering and involvement in specific projects. The Museum's name could be reconsidered to better reflect its district-wide role.

4 Consultation and Analysis

This section synthesises the main points arising from visitor surveys, an audience development study and public consultations undertaken over the last ten years, focusing on the 2011 consultation carried out for present plans. **Appendix 4** presents a summary of these surveys with an analysis and discussion of visitor and user figures since 2005.

The principle points are:

- Total service user figures fluctuate around 23,000 – 26,000 per year; these figures combine on-site visits with off-site and on-line users (website viewers; enquiries and research by email, letter and phone; visitors at off-site Museum activities such as talks).
- Total visitor figures (on-site visits only) have shown an overall decline since 2006 from around 20,000-21,000 to 15,000-16,000 per year. The most obvious cause is the decrease in school visits from around 5,000-6,000 to around 2,000-2,500 per year. This is linked to the reduction in the Learning Officer post from 5 to 2 days per week; smaller class sizes and rising costs of coach travel have also contributed.
- Considering other (non-school) visits, and discounting the effect of 'special events', there has been a slow underlying decline in general public visits by roughly 1,000 since 2005. No particular cause is discernible from the consultations carried out, but see the comments below on re-displaying the local history and archaeology galleries (which date from the 1980s-90s) and extending marketing. These could have some impact on increasing visits.
- Visitor satisfaction levels with exhibitions, activities and learning services are consistently high, which is borne out by visitors' reactions and comments in the Museum. The extent and quality of the collections surprises first-time visitors. 'Things to do and handle' around the galleries are popular, especially with families.
- The Museum attracts a significant core of regular visitors from the immediate area, but attracting visitors from remoter and more rural parts of the district is more difficult. It is also relatively hard to attract young adult audiences (as most museums find).
- Local history and archaeology collections were ranked top of the list of subjects for which visitors would like to see more exhibits and information. These are also the galleries most in need of re-display and updating.

- A larger special exhibitions gallery, more space and opportunities to study collections and a new activity & learning room were ranked top of the list to improve facilities in the 2011 consultation.
- Some feeling that Museum should promote itself more; this is partly a question of the Museum's limited marketing resources (budget and staff time), and partly the challenges of marketing to a large rural area and the site location uphill from the town centre, which makes it more difficult to pick up casual footfall.
- There is support for improvements to the historic site within which the Museum stands; making more of the castle and grounds, including interpretation of the site's history, would be popular and help to increase footfall.

5 Key Aims

The plan to improve the Museum will fall into two stages:

Stage I New Off-site Store to be built in Saffron Walden

The Council and Museum Society will provide a new purpose-built store at Shire Hill, Saffron Walden, to replace the current off-site store at the Council's Newport depot

This will free up the Museum buildings sufficiently and prepare collections for:

Stage 2 Museum to be extended (at east end) to improve facilities and displays

The Heritage Lottery Fund have indicated that they are willing to discuss an application for Stage 2 and preliminary discussions have already taken place with English Heritage whose consent will be required for building work and groundworks.

2013 – 2018 Key Aims

This two-stage plan will be the framework for realising six key aims:

1. Improve and rationalise the storage of collections in off-site storage and in the Museum, through the construction of a new off-site store and a revised collections policy [Stage I]
2. Improve management, accessibility and display of collections by developing the collections database [Stage II]
3. Extend and reorganise the Museum building to improve its displays and facilities for visitors, staff and volunteers, researchers and visiting groups (school and other) [Stage II]
4. Improve interpretation and use of the Museum and castle site [Stage II]
5. Maximise community involvement through appropriate opportunities to contribute to the Museum Service [Stage II]
6. Develop a marketing policy for the Museum and site as a local amenity and heritage destination to local and wider audiences, to increase use, income and community well-being [Stage II]

6 Specific Objectives for each Key Aim

Key Aim 1 Improve and rationalise the storage of collections in off-site storage and in the Museum, through the construction of a new off-site store and a revised collections policy

- a. Acquire / build and fit out new store of sufficient capacity to appropriate standards
- b. Move collections from off-site store at Newport Depot into new store
- c. Remove the horse-drawn vehicles from Hempstead to new store or display on-site
- d. Large intake of archaeological project archives (Stansted Airport, A120 and others)
- e. Specific collections from the Museum site to be re-housed in off-site store
- f. Audit and re-edit of location records for collections which have been moved
- g. Identify and research potential items for transfer or disposal or deaccessioning for handling use

Key Aim 2 Improve management, accessibility and display of collections by developing the collections database

- a. Agree an integrated IT Plan for the Museum Service to improve speed and efficiency of access to programmes and data, especially the Modes collections database, throughout all Museum buildings including the new store
- b. Digitisation of collections not yet on computer, focusing on archaeology and local history and geology (display and documentation priorities)
- c. Editing and enhancing content (including images) of records already on computer, see Objective 1f
- d. Provide an appropriate level of public access to the collections database in the Museum for specific collections where there will be a high public demand, starting with local history photographs

Key Aim 3 Extend and reorganise the Museum building to improve its displays and facilities for visitors, staff and volunteers, researchers and visiting groups (school and other)

- a. Provide new and larger special exhibitions gallery
- b. Increase gallery space for local history exhibits, with a focus on recent (20th century) history of the district
- c. Update displays of local archaeology to reflect recent fieldwork and link with recent geology and natural history (Ice Ages) and with local history (medieval – Tudor)
- d. Re-display world cultures (ethnography) gallery following return of loaned exhibits to the Cuming Museum, focusing on local collectors and their worldwide links
- e. Improve facilities for schools and other groups, by creating a new learning and activity room

- f. Re-assess accessibility, both physical and intellectual, for all who visit, work in and use the Museum buildings
- g. Improve facilities for visitors, researchers and volunteers (workroom space) and staff and Museum Society officers (offices) and for display and educational equipment

Key Aim 4 Improve interpretation and use of the Museum and castle site (the former inner bailey of Walden Castle, scheduled ancient monument)

- a. Geophysical survey and report with interpretation and recommendations
- b. Historical research on documentary sources (principally manorial rolls at the Essex Record Office) to compare with the geophysical survey and elucidate the later medieval history of the site (this requires an experienced volunteer local historian)
- c. In the expectation of archaeological planning conditions as determined by English Heritage, make use of any opportunities offered by the Stage II Museum improvements to investigate the archaeology of site, with community involvement where appropriate
- d. Work with the Council (Planning & Development), English Heritage and other archaeological colleagues to improve on-site interpretation, and to encourage use and appreciation of the museum and castle site as a local heritage and leisure amenity

Key Aim 5 Maximise community involvement through appropriate opportunities to contribute to the Museum Service

- a. Determine specific volunteer and work experience roles and become pro-active in seeking volunteers for these, rather than responding to requests. These roles may be long-term such as desk volunteers, or short-term for specific projects in collections management, educational or events
- b. Work with the Museum Society to enlist a volunteer co-ordinator role, releasing staff-time for professional work priorities
- c. Use website, Museum Society and other local media to advertise volunteering opportunities
- d. Explore ways of adding a recent acquisitions case and opportunities for community displays to galleries in an extended museum

Key Aim 6 Develop a marketing policy for the Museum and site as a local amenity and heritage destination to local and wider audiences, to increase use, income and community well-being

- a. Identify new marketing opportunities in terms of collections, facilities, merchandise and site as a community and heritage destination, and identify the target audiences for these
- b. Encourage use of the Museum and site by local community and groups, including new and non-traditional museum visitors
- c. Work with the Tourist Information Centre (TIC) and tourism authorities to promote Uttlesford and Saffron Walden as tourist destinations
- d. Target specific regional and wider audiences e.g. subject specialist societies, with 'packages' designed around key collections and subjects.

7 Phased Plan for Achieving Objectives (with resources required to meet them)

STAGE I

Key Aim 1 Improve and rationalise the storage of collections in off-site storage and in the Museum, through the construction of a new off-site store and a revised collections policy

Objective	Phased Actions	Lead Person	Resources needed	Est Cost	End Date	Performance Measurement
a) Acquire / build and fit out new store of sufficient capacity to appropriate standards	Acquire site, relevant agreements and planning permission	A Webb	Council Planners, Surveyor and Curator's time	£ 1,000?	March 2013	Site acquired and planning permission granted
	Design brief developed	Surveyor	Curator and staff		April 2013	Brief ready to go out to tender
	Tender process and appointment of contractor	A Webb	Council		June 2013	Contractor appointed
	Build store and fit-out	A Webb	Contractor Council staff to monitor	£ 500,000? (to tender)	October 2013	Store built and fitted out
	Commission and hand-over	Curator	Contractor, Council staff Museum staff time to monitor environment and check fit-out, label racking		December 2013	Store ready for collections to move in
b) Move collections from off-site store at Newport Depot into new store	Assess removal methods for each collection, research removers and cost	Curator	Conservation Officer and other Museum staff		Summer 2013	Removal plan agreed
	Pack and prepare for removal	Curator	Museum staff, volunteers	£ 1,000 ?	From summer 2013, by store Ready by end January 2014	Collections ready to move
	Set timetable for moving in stages	Curator	Museum staff		Autumn 2013	Timetable agreed
	Appoint removers	Curator	Museum staff R Auty	£ ?	January 2014	Removers appointed
	Moving collections and re-locating in new store	Curator	Museum staff, volunteers A Webb, R Auty		Complete by end March 2014	Collections moved into store

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c)	Remove horse-drawn vehicles from Hempstead	Agree temporary rent of large barn	Curator	Museum Society Board to agree as lessor	£1,200	April 2013 – March 2014	New storage venue ready
		Identify haulage assistance	Curator	Volunteer offer, Museum society Board agree fuel costs	Nil	April 2013	Haulage contractor appointed
		Arrange for access to current storage location and plan move	Curator	Conservation Officer, farmer, haulage	Nil	March 2013	Access arranged; move planned
		Removal to off-site store	Haulage contractor	Curator, Conservation Officer	£100?	April 2013	Horse drawn vehicles removed to new offsite store
		Clean, conserve and assess for display	Lynn Morrison	Museum staff and voluntary help	£100	April 2014	Items cleaned, conserved and on display
d)	Large intake of archaeological project archives (Stansted Airport, A120 and others)	Co-ordinate deposition of archives from various contractors	Curator	Museum staff, volunteers	Time	Summer 2014	Co-ordination achieved
		Check boxes and records, accession and add basic catalogue record on sites database	Curator	Museum staff, volunteers	Time	Summer 2014	Boxes and records checked; database updated
		Identify key artefacts and themes for display	Curator	Museum staff	Time	Autumn 2014	Themes and artefacts identified
e)	Specific collections from Museum site to be re-housed in off-site store	Plan timetable and resources needed, book any specialist removal help needed and arrange manual handling training for staff and volunteers	Curator	Museum staff, volunteers Van hire Removal company to take large, heavy or special items	£1000	Autumn 2014	Timetable planned; resources identified and arranged; training identified and carried out for staff and volunteers
		Move to store, re-locate	Curator	As above	£100	September 2014	Move to store completed
f)	Audit and re-edit of location records for collections which have been moved	Thousands of items – needs additional staff funded by Stage II HLF project, add photos of significant items	David Whorlow	Museum staff initially, but may need to be completed with Project staff and volunteers	£?	December 2016	Audit completed; records updated
g)	Identify and research potential items for transfer or disposal or deaccessioning for handling use	Needs to be done in tandem with work on database records, in line with Collections policy	Curator	Museum and Project staff Museum Society Board to approve, MMWG to ratify	Time	December 2016	Items identified and researched

STAGE II

Key Aim 2 Improve management, accessibility and display of collections by developing the collections database

Objective	Phased Actions	Lead Person	Resources needed	Est Cost	End Date	Performance Measurement	
a)	Agree an integrated IT Plan for the Museum Service to improve speed and efficiency of access to programmes and data, especially the Modes collections database, throughout all Museum buildings including the new store	N Wittman, Curator	Museum and IT staff Consult Director of Corporate Services on budgets for IT; Museum Board	£? (to be costed with IT)	December 2015	IT plan agreed and implemented	
b)	Digitisation of collections not yet on computer, focusing on archaeology and local history and geology (display and documentation priorities)	David Whorlow	Project staff and volunteers Some input from Museum staff	Time	December 2016	Digitisation completed	
c)	Editing and enhancing content (including images) of records already on computer, see Objective 1f	David Whorlow	Project staff and volunteers Some input from Museum staff	Time	Summer 2017	Editing and enhancing completed	
d)	Provide an appropriate level of public access to the collections database in the Museum for specific collections where there will be a high public demand, starting with local history photographs	Co-ordinate with gallery display timetable	David Whorlow	Museum staff	Time	September 2016	Timetable agreed
	Specify and order hardware	Curator	IT and Museum staff	£2000	December 2016	Hardware identified and ordered	
	Validate database records for public access to permitted fields	David Whorlow	Museum staff	Time	January 2017	Database records validated	
	Pilot test with focus group before running live	David Whorlow	Museum staff	Time	Feb – May 2017 Live Summer 2017	Pilot test carried out and results analysed	

Key Aim 3 Extend and reorganise the Museum building to improve its displays and facilities for visitors, staff and volunteers, researchers and visiting groups (school and other)

Objective		Phased Actions	Lead Person	Resources needed	Est Cost	End Date	Performance Measurement
a)	Provide new and larger special exhibitions gallery	Stage II extension and improvement of Museum	Curator	Stage II HLF Project capital programme to extend Museum	£1,000,000 (approx capital cost for Museum extension)	2018	Grant acquired and extension built
b)	Increase gallery space for local history and redisplay, incorporating agricultural collections and 20 th century history of the district	Stage II extension and improvement of Museum	David Whorlow	Stage II HLF Project capital programme to extend Museum	Included in above	2018	Increased gallery space available
c)	Update displays of local archaeology to reflect recent fieldwork and link with recent geology and natural history (Ice Ages) and with local history (medieval – Tudor)	Stage II extension and improvement of Museum	Curator	Stage II HLF Project capital programme to extend Museum	Included in above	2018	Displays updated
d)	Re-display world cultures (ethnography) gallery following return of loaned exhibits to the Cuming Museum, focusing on local collectors and their worldwide links	Stage II extension and improvement of Museum	Curator	Stage II HLF Project capital programme to extend Museum Specialist ethnography advisor	Included in above	2018	World cultures gallery re-displayed
e)	Improve facilities for schools and other groups, by creating a new learning and activity room	Stage II extension and improvement of Museum	Gemma Tully	Stage II HLF Project capital programme to extend Museum	Included in above	2018	New learning and activity room acquired

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f)	Re-assess accessibility, both physical and intellectual, for all who visit, work in and use the Museum buildings	Stage II extension and improvement of Museum	Curator	Stage II HLF Project capital programme to extend Museum	Included in above	2018	
		Start with 'access audit 'of things to improve, to include with specification for Stage II	Curator	Museum and Council staff, Focus Group, volunteers	Time	October 2017	Access audit carried out and results analysed
		Specification for designers in display brief	David Whorlow	Museum staff, standards on museum displays and texts	Time	2018	Specification drawn up
g)	Improve facilities for visitors, researchers and volunteers (workroom space) and staff and Museum Society officers (offices) and for display and educational equipment	Stage II extension and improvement of Museum	Curator	Stage II HLF Project capital programme to extend Museum	Included in above	2018	Facilities improved

Key Aim 4 Improve interpretation and use of the Museum and castle site (the former inner bailey of Walden Castle, scheduled ancient monument)

Objective	Phased Actions	Lead Person	Resources needed	Est Cost	End Date	Performance Measurement
a) Geophysical survey and report with interpretation and recommendations	Geophysical survey Report on findings	Curator	Funds to be identified for geophysics analysis UDC Planning (Andrew Taylor) has new castle conservation plan	Around £6k	End of 2013	Survey completed and report written
b) Historical research on documentary sources (principally manorial rolls at the Essex Record Office) to compare with the geophysical survey and elucidate the later medieval history of the site.	Identify local historian with the skills and experience to extract references from manorial court rolls (manor of Chepyng or Chipping Walden)	Curator	Volunteer local historian	Nil	End of 2013	Research carried out and results compared with geophysical survey
c) In the expectation of archaeological planning conditions as determined by English Heritage, make use of any opportunities offered by the Stage II Museum improvements to investigate the archaeology of site, with community involvement where appropriate	Stage II extension and improvement of Museum	Curator	Stage II HLF Community involvement	See 3a) above	2018	Archaeology of the site investigated by excavation
d) To improve on-site interpretation, and to encourage use and appreciation of the museum and castle site as a local heritage and leisure amenity	Installation of interpretation boards. Greater publicity, locally, throughout Uttlesford and nationally	Gemma Tully	Council (Planning & Development), English Heritage and other archaeological colleagues Tourist Information Centre	£1000	2018	Improved site interpretation Greater use of Museum and facilities

Key Aim 5 Maximise community involvement through appropriate opportunities to contribute to the Museum Service

Objective	Phased Actions	Lead Person	Resources needed	Est Cost	End Date	Performance Measurement
a) Determine specific volunteer and work experience roles and become pro-active in seeking volunteers for these.	New volunteer policy for the Museum, with revised procedures and role descriptions	Gemma Tully	Museum Support Committee Museum staff	Time	March 2013	Volunteer policy in place
	Plan and train small volunteer team to assist with packing and moving collections to new store	Curator	Museum staff Volunteers Museum budget	Time Training meetings cost £100	December 2013	Team trained
	To recruit and train volunteers with appropriate computer skills and subject knowledge to assist with basic documentation tasks at store	David Whorlow	Museum Support Committee Project staff to train and supervise volunteers Museum budget	Time Training meetings cost £100	March 2014	Volunteers recruited and trained
	Assess opportunities for new volunteer roles in extended Museum and implement	Curator	Museum Support Committee Museum staff	Time	2018	New opportunities identified and volunteers recruited to implement
b) Work with the Museum Society to enlist a volunteer co-ordinator role, releasing staff-time for professional work priorities	Museum Support Committee to draw up role description and recruit.	Curator	Museum Support Committee	Time	Summer 2013	Volunteer Co-ordinator in post
c) To recruit for volunteering opportunities	Use website, Museum Society and other local media to advertise volunteering opportunities	Gemma Tully	Museum Support Committee	£500	2014	Volunteers recruited to relieve pressure on Museum staff
d) To improve displays	Explore ways of adding a recent acquisitions case and opportunities for community displays in an extended museum	Curator	Museum staff	Included in HLFproject	2018	New acquisitions and community displays cases installed.

Key Aim 6 Develop a marketing policy for the Museum and site as a local amenity and heritage destination to local and wider audiences, to increase use, income and community well-being

Objective	Phased Actions	Lead Person	Resources needed	Est Cost	End Date	Performance Measurement	
a)	Audience for refurbished and extended museum	Carry out survey to identify the target audience for new museum	Gemma Tully	Museum staff	Time	2017	Target audience identified
b)	Identify new marketing opportunities in terms of collections, facilities, merchandise and site as a community and heritage destination	Develop and implement Marketing Plan for extended and refurbished Museum, including new income-generating streams and services such as hire of activity room for private functions	Curator	Museum staff Marketing advice or consultant	Included in HLFproject (£15,000 for all marketing and publicity and re-launch)	2017	Marketing plan developed in time for opening of refurbished museum in 2018
		Publicity drive for Museum's re-opening, promoting re-displayed galleries and new income-generating services	Gemma Tully	Museum and Council staff Museum Society	Included in above	2018	Greater use of museum through publicity drive
c)	Increase use of refurbished and extended museum	Generate greater use of the Museum and site by local community and groups, including new and non-traditional museum visitors through greater publicity locally and nationally	Gemma Tully	Museum staff	See 6 b) above	2018	Increased numbers coming through the door and high level of satisfaction with visit and services Translates into more income from ticket sales, donations and voluntary support
d)	Promote Uttlesford and Saffron Walden as tourist destinations and thereby benefit the museum	As a museum, work alongside the Tourist Information Centre (TIC) and other tourism agencies to showpiece the attractions of the local area	Gemma Tully	Museum staff time Other Council staff (Economic Development Officer) and Tourist Information Centre (SW Town Council)	Time	2018	Saffron Walden and Uttlesford attract greater tourism which benefits the Museum and local business
e)	Generate wider	Target specific regional and	Gemma Tully	Museum staff time	Included in	2018	Take up of packages

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	audience for the museum	wider audiences e.g. subject specialist societies, with 'packages' designed around key collections and subjects.		Budget to market	HLF project Time		by a wider audience
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8 Resource Plan Summary

Stage I New Store

To be achieved within existing capital budgets (balance from previous Heritage Quest Centre project) held by the Council and Museum Society, approximately £500,000 (to include clearance of site and construction of replacement shower block for Waste Disposal Services).

Additional funds may be sought from grant sources to fit out the store, and some local fund-raising as required.

Stage II Extended and Improved Museum with re-displayed human history galleries

(Application to Heritage Lottery Fund)

While work on costing this project is in early stages (May 2013) it is anticipated that the total cost for all capital and project elements will be in the region of £1 -1.5 million, requiring a 10% partnership contribution from local sources (i.e. any or all of the following: Council, Museum Society, other local funds or help-in-kind including volunteer contribution costed to HLF formula). Other potential local, regional and national sources of grants towards elements of the project will be investigated.

The Museum Society's Museum Support Committee will work with the Curator and Museum staff to develop fund-raising and other support for the Museum's Forward Plan. As part of this process, the Museum Society is reviewing the most effective future use of other Museum buildings, the Schoolroom and Curator's house, in order to sustain the service in the long-term and support the Forward plan.

9 The date the Forward Plan will be reviewed

The Action Plan (Section 7) should be updated as it progresses.

A review should be undertaken in November each year in line with the annual budget planning cycle.

The Forward Plan will be due for a fundamental review in 2018.

APPENDICES

Museum Service Forward Plan 2013 - 2018

Appendix 1
Organisational Structure : Corporate Services / Museum Service

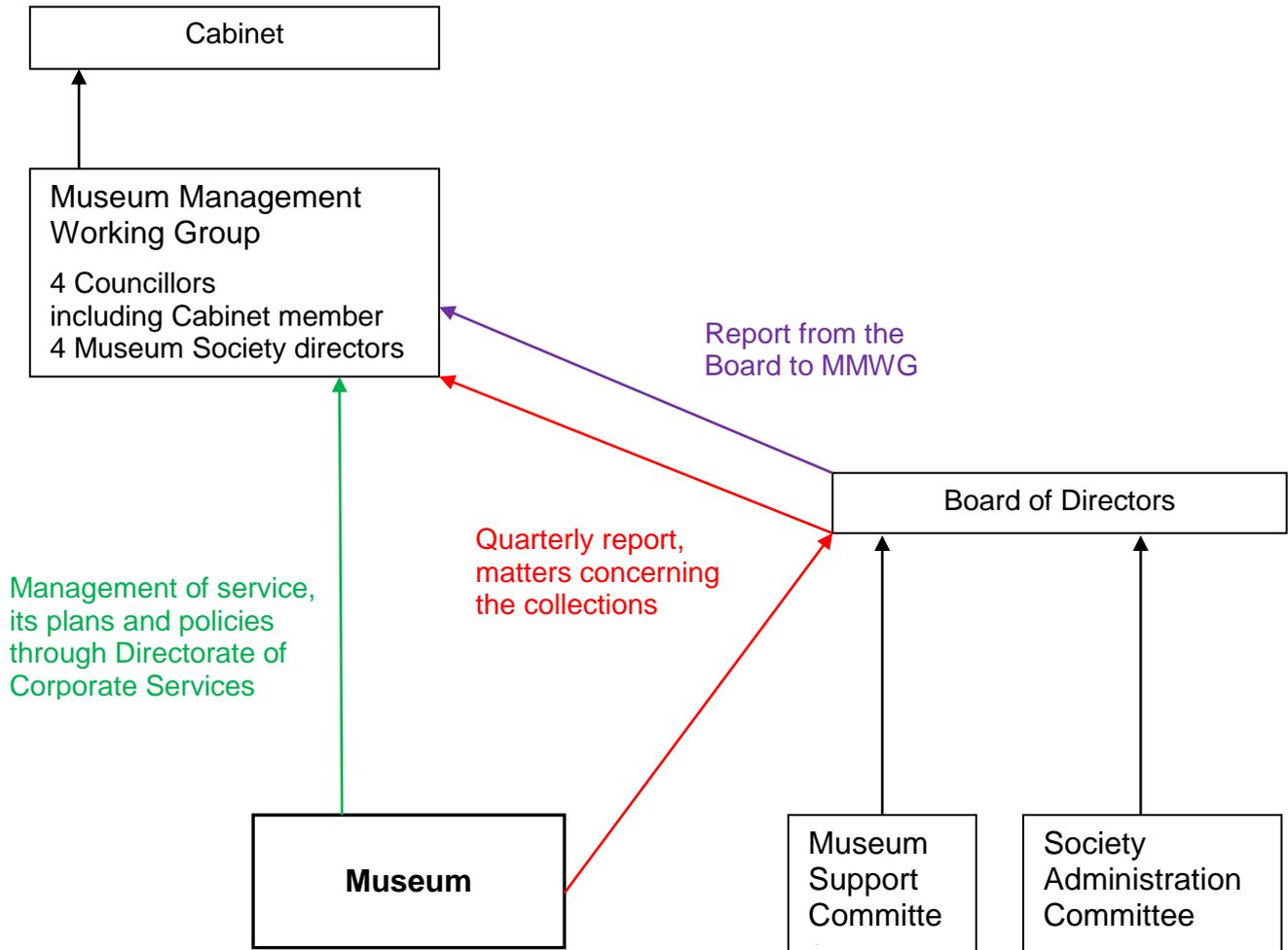
[Insert organisational chart from Intranet] – separate attachment for Accreditation

Appendix 2 Governance Structure for Museum : Uttlesford District Council and Saffron Walden Museum Society Ltd

Showing reporting structure for governance of the Museum Service

Uttlesford District Council

Saffron Walden Museum Society Ltd Charity no. 1123209



Appendix 3 Analysis of the Environment

This section presents:

1. A 'snapshot' of the Museum Service – its collections, buildings, human resources and current budget
2. A brief appraisal of the Museum Service (SWOT)
3. A broader consideration of the environment in which the Museum Service now operates (PESTEL)

Collections

Estimated at around 175,000 objects and specimens (total below + allowance as documentation projects nearly always result in an increase). Local archaeological collections will be considerably updated by the intake of finds and records from recent excavations in the district as soon as the new store is operational. Equally, moving to better storage accommodation will help with the research, sorting and rationalisation of older collections but this is a very time-consuming process.

Human History	Social & Local History	55,500
	Decorative arts (Ceramics & Glass)	2,460
	Archaeology	40,000
	World Cultures (Ethnography)	4,000
Natural Sciences	Natural History	52,653
	Geology	17,273

The return of around 120 items currently on display in the 'Worlds of Man' (world cultures) gallery to the Cuming Museum over the next 2-3 years (long term loan) will lead to the re-display of this gallery in due course.

Buildings

Museum Street, Saffron Walden (sharing grounds with castle keep and Castle Hill Tennis Club)	Museum Grade II listed building purpose-built museum 1835	1,218 m ² (excl. cellars and roofspace)
	Schoolroom - former Museum Street School (Museum Society)	138 m ²
	Workshop	22 m ²
Council depot, Newport	Off-site store (UDC)	342 m ² (total both floors)
Hempstead	Museum Society member's barn (private ownership) – vehicles need to be removed	4 horse-drawn vehicles

There is also the Curator's house in Castle Street and its garage in Museum Court.

Collections are therefore spread between several locations (Museum, Schoolroom and Newport store, and Hempstead) and staff have to work between several buildings. With reduced staffing levels, and public opening hours to be maintained 365 days of the year, consolidation is needed. The Museum Street site is unsuitable for a large off-site store but

moving off-site storage from Newport into Saffron Walden would help. The functions of the Workshop could be incorporated in an extended and improved Museum building, so that the Security Officer and other staff need not leave the main building to use it.

Human resources

Council employees 5.9 FTEs	Permanent staff 5.5 FTEs	Curator
		Visitor & Learning Services Officer
		Natural Sciences Officer
		Documentation & Exhibitions Officer
		Conservation Officer
		Security Officer p/t
		Saturday Assistant (reception, 6hrs per wk)
Volunteers Approx 2.5 FTEs but varies (more for activities and events)	Casual Assistants Approx 0.4 FTE	Currently 6, to assist with weekend and bank hol opening, and extra stewarding as required
	Desk Volunteers	About 30 on a rota for reception desk Mon-Fri, and Sun / Bank hol afternoons
	Learning services	Currently 3 volunteers assisting V&LS Officer
	Collections care and admin tasks	Currently 6 volunteers regularly assisting in these areas, with other short-term work placements from time to time

In addition: considerable amount of voluntary time from Museum Society directors, officers and volunteers towards Museum management, Society business and events.

Budgets

The Council budget for the Museum Service 2012-13 has a forecast outturn of £197,000 (net direct total) representing a reduction of approximately 20% since 2009/10.

The Mid Term Financial Strategy requires this to be reduced to £160,000 by 2015/16.

The Museum Society provides funding for purchases to collections and other collections-related projects. During 2011-13 it has funded replacement of display lighting to improve energy-efficiency of displays; the redisplay of the Ancient Egypt gallery; a new Touch Screen Computer with programme for the Natural History Discovery Centre; and a number of purchases for the collection. In 2012-13 it is also making a contribution of £6,000 towards the operating costs of the Museum, but is now unable to continue this contribution after 2012/13 due to the financial pressures of providing funding for Stage 1 (new store) and Stage 2 (Museum improvements) discussed below.

3.2 A Brief Appraisal of the Museum Service (SWOT)

Strengths

- Collections: variety plus depth - something for everyone, mix of global and local
- Historical attraction and amenity – rare early 19th century museum, Castle ruins on green site
- Well-respected as 'family friendly' museum with learning opportunities, especially through sessions for schools and family activities

- Good community links and volunteers
- Loyal core of visitors and Society members
- Support of Museum Society and District Council, providing a mix of public and charitable funding
- Accredited Status under the government's national accreditation Scheme for public museums and galleries. This confirms that the Museum adheres to a minimum standard in all aspects of its service. It is necessary or desirable for obtaining grant-aid and public confidence. The Museum's Accredited status is due for review in late 2013.

Weaknesses

- Poor, cramped storage, offices and work spaces behind the scenes
- Facilities spread through 3 buildings on site (Museum, Schoolroom, workshop) which can be problematic to staff with a small team
- Shortage of space and opportunity to display permanent collections, especially updating the early history / archaeology and the recent history of north-west Essex
- Lack of modern visitor facilities (shop, refreshments, adequate education and activities space within the Museum building) which in turn restrict opportunities to maximise income, within the limits imposed by staffing levels and deployment of volunteers
- Difficulties of operating in an historic building – energy efficiency, repairs and maintenance, 'fitness for purpose'
- Staff stretched: multiple roles, not enough curatorial posts to cover all collections or to undertake major gallery redisplays while maintaining special exhibitions programme
- No dedicated outreach staff and only a small marketing budget to promote the service
- Learning services reduced from full-time to 2 days per week, which reduced income from taught sessions for schools and souvenir sales
- Site is uphill from the town centre, vehicular access via one-way streets, drive poorly lit after dark and in winter – this does not attract casual footfall

Opportunities

- Scope for reviewing IT and staffing to digitise collections backlog and improve collections management and access for all users, subject to grants and funding
- Update and extend permanent displays and special exhibitions, attracting more visits
- Enhance use of and access to collections through learning opportunities, on-line access and outreach subject to resources
- Improve interpretation and use of the historic site, especially following recent geophysical survey of the Museum and Castle grounds
- Develop community use of site and public areas through small-scale hire
- Income generation can be increased with a larger and better-displayed shop, as long as it can be comfortably staffed by one volunteer
- A larger and better-equipped learning and activity room would enable more income to be raised through school and adult learning and other activities. When not in use by the Museum, it could be hired out for private functions and meetings.

- Need to make Museum building more efficient (energy, use of space, facilities)
- Other Museum buildings (e.g. Curator's house at 40 Castle Street) could generate more income through commercial letting if released from Museum use.
- The whole site will be enhanced by the Council's scheme to improve castle ruins, with potential benefits for both Museum and castle through a co-ordinated approach

Threats

- Current uncertainty over medium-term and long-term funding and staffing levels
- Volunteering opportunities compromised by lack of staff to run and supervise appropriate projects and lack of workspace
- Maintenance of historic Museum building, especially with problems of damp, energy costs and accessibility to some areas

3.3 The Environment in which the Museum Service operates (PESTEL)

Local Documents consulted:

Uttlesford District Council Corporate Plan 2013-18 (Draft)

Uttlesford Economic Development Strategy 2012-14

District Profile: An Economic, Social and Environmental Summary Profile of Uttlesford, January 2013

Saffron Walden Conservation Area Appraisal and Management Plan 2012

Political

Nationally and regionally, the political environment in which museum services operate is changing. New networks and 'centres of excellence' have yet to become embedded.

- Nationally, public services and the cultural sector are undergoing reorganisation and adjusting to cuts in funding with challenges and opportunities for creative thinking to safeguard and improve services' futures.
- Arts Council England (ACE) vision for museums centres on celebrating excellence, inspiring people, fostering sustainability and resilience with a well-trained workforce.
- Regionally and at county level, museum and heritage bodies are re-organising themselves, e.g. Museums in Essex Committee, and the shape of future cultural networks for museums is gradually being redefined. Former 'hub' museums are being replaced by a smaller number of 'core' services, which in East of England will be Cambridge University Museums and Norfolk Museums & Archaeology Service.
- The success of SHARE in the East of England region ('network of know-how' and cooperative training for museums) supports collaboration and workforce development.
- Museums should be well-placed to act as a cohesive social, educational and cultural force; the challenge is to find sufficient resources to realise the potential of their collections in tangible public benefits.

Uttlesford occupies the largest area of any Essex district (63,752 hectares) with a population of about 77,000 – 78,000 [2011 Census figures to be included when available]. The district is expected to build 3,300 new homes over the period 2013-18.

Saffron Walden, the administrative centre, is in the north of the district and relatively distant from communities in the south of Uttlesford. The district is predominantly rural with a landscape recognised as of particular historical and natural interest and character, for example by the recently-formed Hundred Parishes organisation. It also enjoys good north-south road and rail links to London and Cambridge, and the new A120 has enhanced road links to Stansted Airport between Bishop's Stortford and Great Dunmow.

Political Challenges for the Museum Service:

- Nurturing and promoting a 'sense of place' - the natural and human story of Uttlesford – for local residents and for visitors
- Being relevant to local communities, both established and newcomers, by reflecting better the recent history of the district and changes in the 20th century to rural areas
- Preserving and making available the results of archaeological research caused by recent and ongoing development
- Promoting the service and making collections available to a wider audience, including communities in the south of the district and those who currently have little time or inclination to use museums. Conversely, the Museum Service also attracts visitors and users from South Cambridgeshire (where there is no local authority museum provision).
- The name and 'branding' of the Museum could be expanded or changed to reflect the district and wider scope of its collections. Although well established, the name 'Saffron Walden Museum' leads visitors to expect a small museum essentially concerned with the town's local history, and does not help to attract users from the south of Uttlesford.

Economic

Looking at the national picture, local authority expenditure on museum services in 2011-12 decreased by 11% (Local Authority Revenue Expenditure and Financing in England: 2011 to 2012 Final Out-turn, released by the Department for Communities and Local Government, quoted by Museums Association).

Public funding for the Museum Service is under pressure, although the Council's current financial position is secure. The scope and quality of the Museum's collections is a major asset but also represents a challenge for a district local authority of Uttlesford's size to provide sufficient resources to manage and realise the collections' potential. Uttlesford is regarded as a wealthy and desirable district in which to live, although there are issues concerning affordability of housing, some pockets of deprivation and problems for some dispersed rural communities with public transport and access to services. Many middle-income households may be feeling the effects of the recession, and there are many competing priorities for people's money and leisure time.

Business in Uttlesford is characterised by a higher than average knowledge sector, and a relatively high self-employment rate, but a comparatively low local economy size. Airport-related companies look for regional and national marketing rather than local exposure in a small market town, and scientific research sites in north Uttlesford and South Cambridgeshire have a highly specialised niche markets with national and international markets. There is therefore limited opportunity for business sponsorship or hire of the galleries for corporate functions, and this has been borne out by experience despite efforts to attract such support.

There are interesting challenges for the district posed by its position on the M11 corridor and London-Cambridge railway line, and how 21st century needs for housing and development will be accommodated in a rural area of small historic market towns and dispersed villages. Stansted Airport and the A120 corridor have seen significant development in recent years (transport links, Airport-related industries, housing around Takeley and Dunmow). Such developments also produce much new archaeological information which has caused extensive re-appraisal of local prehistory and early history, with implications for storage capacity and displays in the Museum. Meanwhile, the recently-formed Hundred Parishes organisation seeks to promote the special nature of the landscape and character of Uttlesford and immediately adjacent areas.

Economic Challenges for the Museum Service:

- Stability of core funding from the Council and Society over the period of this forward plan (this will also be crucial in retaining Accredited status and attracting other funding)
- Having a sufficient core of professional / curatorial staff in appropriate subjects to be able to use the collections effectively, to the benefit of the public and sustainability of the service, and to forge and sustain community partnerships
- Heritage Lottery Fund willing to consider proposal for extending and improving Museum
- Saffron Walden Museum Society Ltd, through its charitable status and role as owner of the Museum buildings and collections, provides many of the benefits of independent status in raising funds for capital projects and specific appeals through grants, donations and other means (legacies, fund-raising events)
- There is limited scope for business sponsorship, but there may be more scope for attracting private philanthropy, especially through the Museum Society's charitable status
- The visitor economy is important to Uttlesford and rural areas in particular, and supports the economic viability of communities (Uttlesford Economic Development Strategy 2012-14) and a Destination Management Plan has been proposed, to which the Museum could contribute
- Remain flexible and receptive to future local and regional partnership opportunities should appropriate ones emerge

Social

Uttlesford regularly scores highly in surveys (e.g. MORI survey of Essex districts 2012, Halifax survey of 'best places to live', 2013). 92.3% of the district population is white, however, the ethnically diverse proportion of the population is growing - up from 4% in 2001 to over 7% in 2011. Given the wide ranging nature of its collections the Museum would seem well placed in Uttlesford to play a part in celebrating diversity ([Census 2011: Summary of Uttlesford residents by ethnicity grouping](#)). Compared to the national average, the Uttlesford population contains a relatively high proportion of married couples, with or without children. The workforce contains a relatively high proportion of professional, managerial and technical workers, and workers commuting outside the district. By contrast, the public sector is relatively small.

"The level of local amenities is important for a good quality of life for local residents, making an area an attractive place to live and for tourists to visit." (District Profile: An

Economic, Social and Environmental Summary Profile of Uttlesford, January 2013). Uttlesford scores in the lowest 40% although its rural nature has to be taken into account.

The Council's Corporate Plan 2013-18 highlights the centrality of localism, and the role of the voluntary sector. The Museum Forward Plan could support this by providing a sense of place through displays and learning services, and encourage greater contribution from volunteers and the local community in those aspects of the Museum service where it is appropriate.

New housing will require new or expanded services including schools. Most of the Museum's educational work is with primary schools. There are four state secondary schools in the district and there is a potentially good market for adult education and informal learning opportunities, as manifested by the number of local societies, evening classes and thriving local history network.

Social challenges for the Museum Service:

- Develop the Museum and use of its collections to improve the experience of visitors.
- To be seen as relevant to new centres of population (e.g. along Dunmow – Takeley A120) and tell the stories of 20th century history as well as more ancient roots of landscape and communities
- To find resources to extend outreach and marketing into rural communities – ‘taking the service out’
- To attract use by ethnic minority populations on Uttlesford, and encourage all visitors and users to appreciate the diversity of human cultures, locally and worldwide, using local history and world cultures collections
- To find resources to extend formal learning services to schools, including closer working with secondary schools (building on experience and high reputation of service)
- To find resources to provide informal and formal learning opportunities for adults, emphasising ‘hands-on’ learning with the collections as a unique selling-point

Technological

Provision of fast Broadband is high on the agenda for local business. The internet link between the Council Offices and Museum is sometimes prone to slow speeds or disruption for a variety of reasons, and collections management is compromised by lack of a computer link to the off-site store. Documentation would also benefit considerably from a local wi-fi network so that laptops could be used in the various stores and galleries around the Museum building. There is potentially a wide audience for accessing museum collections on-line, both local and – in the case of the world cultures collection – literally worldwide.

Technological challenges for the Museum Service:

- Working with the Council's IT services and broadband providers to improve efficient use of IT in the Museum to manage collections and make them more accessible
- Consider opportunities for the public to access more information in the galleries, as an integral part of future gallery re-displays

- Explore options with the Council to enhance the Museum's website, increasing interaction with users, and smarter use of social media for effective, low-cost marketing and engaging new audiences
- Explore options to enhance interpretation of the castle site and links with other town trails and websites

Environmental

Local people and businesses value Uttlesford's heritage and natural environment, the rural landscape and small town and village life (Uttlesford Economic Development Strategy 2012-14). Conservation of the castle ruins follows recommendations of The Saffron Walden Conservation Area Appraisal and Management Plan.

There are active networks of local history, natural history and heritage groups and organisations in the district and county. A significant proportion of Museum staff time (mainly the Curator and Natural Science Officer) is spent working with, supporting and fostering relationships with a variety of organisations.

Environmental challenges for the Museum Service:

- As the only cultural and heritage amenity operated by the Council, the Museum should reflect and promote Council values and policy on use of green energy and low carbon footprint, and minimise its energy costs while doing so. This is not straightforward in an historic listed building, but any extension of the present Museum should take the opportunity to refurbish and modernise services and energy use throughout the whole Museum. Prittlewell Priory project at Southend is a recent case in point.
- Balance and align needs of the historic monument and the natural environment on the Museum and Castle site, reflecting both the human history and natural history strands in the Museum's collections
- New store needs to be designed for maximum energy-efficiency
- Maintaining key relationships with other local organisations while staffing is under increased pressure from cuts and managing development projects

Legal

[This section needs discussion with senior Council officers and Museum Society chairman] The Management Agreement between the Council and Museum Society, with associated lease, will need reviewing in the light of changes to storage provision and challenges of financing the service. Improvements to the Museum and site will require special consents from English Heritage. In view of the archaeological features known to exist (Geophysical Survey 2012 by Dr T Dennis) there will be archaeological planning conditions attached to the Museum extension and associated works.

Legal challenges for the Museum Service:

- Clarify and update the management agreement and lease arrangements between the Museum Society and Council (buildings all in Society ownership, including of-site store)
- [Any VAT or Gift Aid issues? – to check with Council and Museum Society]

Appendix 4

4 Consultation and Analysis

A number of external and internal studies of the Museum Service have been carried out in the last ten years.

- 2002 non-visitor report by England Marketing
- 2005 Audience Development research by ABL
- 2007 Museum and Castle public survey
- 2011 Saffron Walden Museum Development Plan public consultation
- Other in-house visitor surveys, and less formal evaluations

Summary of 2005 Audience Development Plan

This research by ABL Cultural Consulting was funded by the Heritage Lottery Fund, in anticipation of the Heritage Quest Centre project. It made a detailed analysis of actual and potential audiences for the Service.

1) ABL found the main characteristics of the Museum's visitor profile in 2005 were:

- Visitor figures were 20,000 per year (prior to loss of full-time Education Officer post)
- 35.6% of visitors fell into 35-44 age group
- Less than one in eight (12.6%) was under 35
- Family groups were 46.7% of visitors
- School groups were 32% of visitors
- Rural communities were 7.4% of visitors
- Ratio of female : male visitors was roughly 3 : 2
- Most local visitors came from Saffron Walden and accounted for nearly 25% of all visits
- A significant number of visitors (nearly 20%) came from East of England outside Essex or further afield
- There was a significant core of frequent visitors
- ABL also found nearly 50% of those surveyed were making their first visit, showing that the Museum was attracting new audiences, and more than half of these said they were likely to visit again
- Satisfaction levels were very high: 85.2% of visitors were 'very satisfied' and the remainder were 'fairly satisfied'
- Visitors particularly liked the 'family friendly' nature of the Museum, interactive exhibits suitable for children, the respected education programme, and the range and quality of the exhibits

2) Potential Visitors

At the time of this survey in 2005, Uttlesford had just over 70,000 residents distributed over a large rural district. ABL Cultural Consulting conducted 360 street interviews in Great Dunmow, Saffron Walden, Stansted Mountfichet and Thaxted.

- Awareness of the Museum was reasonably high (60%)
- Most (70%) felt that the museum is 'an important asset to the local community'
- Of those questioned 48.3% said they would like to know more about the Museum.
- 46.4% wanted to see more of the Museum's collections made available to the public, and this was noticeably stronger in rural communities
- Many young people (16-29) did not feel that the Museum was aimed at people like them, and there was low awareness of the Museum in this age group (38.8%)
- It was felt that the Museum does not promote itself very widely locally

87.4% of Museum visitors surveyed expressed an interest in seeing reserve collections via special exhibitions, related activities and events, or a separate venue (57.8% were 'very' and 29.6% 'fairly' interested).

The strongest demand for access to collections came from specialist subject groups, local organisations and parishes, with demand for behind-the-scenes access, taking collections 'out and about' and on-line access to collections.

Summary of 2007 Museum and Castle public survey

Local residents, councillors and organisations were invited to give their views regarding improvements to the Museum and Castle site. 24 responses were received.

1) Museum

The most popular ideas for improving the Museum were:

- Extend the Museum building at the east end
- Provide a multi-purpose lecture / meeting room for use by schools, groups and for hire
- More display space for exhibits
- A bigger shop

2) Castle

The most popular suggestions for improvements to the Castle site were:

- Access to the castle ruin
- Stabilisation of the castle ruin
- More interpretation of the castle site
- Lighting of the castle

3) Grounds

The most popular suggestions for improving the grounds were:

- Access from the Common or Castle Hill
- Outdoor displays of objects
- Using the grounds for public events such as concerts / plays
- More seating
- Picnic area

- Café

Results of 2011 Saffron Walden Museum Development Plan public consultation

District residents were invited to complete a questionnaire to give their views on how Saffron Walden Museum and its site could be developed and improved, and the services offered to visitors and local communities in Uttlesford. 161 surveys were completed.

Of those who participated in the consultation:

- 96% had visited Saffron Walden Museum.
- Gender: 53% female, 42% male, 5% no response.
- Ages: 4% 20-34, 7% 35-44, 29% 45-64, 54% 65+, 6% no response.
- Work status: 50% retired, 40% working, 1% unemployed.
- Disability: 11% have a long-term health condition, impairment or disability.
- Ethnic origin: of those who answered this question 83% were White – British

1) Museum Opening

Monday was the least popular weekday for a visit (16% of responses).

At weekends the most popular times to visit were Saturday afternoon and Sunday afternoon (both 30% of responses).

Only 24% of those surveyed were interested in evening opening on one weekday per month.

2) Museum Facilities

Participants were interested in better facilities, listed in order of popularity:

- Larger gallery for special (temporary) exhibitions
- Research area for supervised study of collections, including stored objects by appointment
- New Activity Room for schools, workshops, activities and lectures
- Community display case for local organisations and people to present different topics
- Seating area with hot & cold drinks available
- More extensive Museum Shop
- More / better WCs

3) Learning Services

People thought these learning services should be offered, listed in order of popularity:

- Talks and workshops for adults
- Talks and workshops for families
- Exhibits and workshops to support local community projects
- Evening classes for adults
- Expanded schools loan box service

4) Access to More Collections

People wanted to see more of these exhibits and information, in order of popularity:

- Local history photographs, prints and maps
- Local and social history objects
- Archaeology (local)
- Temporary exhibitions
- Costume and textiles
- More information on the collection on touch screens in the Museum galleries
- Natural History
- Search and browse collections on-line at home
- Ceramics and glass
- Agricultural tools and horse-drawn vehicles
- Rocks, minerals and fossils
- Guided tours on audio guide
- World cultures (as in 'World of Man gallery')

5) Castle and Grounds

Participants agreed the site could be improved in the following ways, in order of popularity:

- Information boards on history of Castle and site
- Use of Castle and grounds for outdoor performances and events
- Project to investigate town and castle history, with opportunity for community involvement
- Access to Castle ruins
- Picnic seating in grounds
- Improved on-site visitor parking & turning circle
- Facility for parking bicycles
- Improved lighting of drive & Museum after dark
- Improved pedestrian access along drive
- Improved pedestrian access from Church Street

Informal feedback

The previous Education Officer undertook a consultation exercise with some local schools in 2007. It was found that:

- Primary schools like imaginative sessions devised with lots of artefacts and specimens for children to handle and explore. Things to handle are more important than looking at objects in cases.
- Often teachers do not know much themselves about some topics and do not have time to do research
- Support materials for follow-up work in the classroom would be welcome

- There are a number of schools in the district which do not or cannot visit the Museum – there is scope to extend the range of loan boxes
- Secondary schools say they do not have time to take students on visits anywhere - but this may change with government policy making it obligatory for these students to study original material

Current Visitor Figures 2006-2012

Figures for Museum **visitors** and **users** have been taken from the quarterly and annual reports for the Museum Service since 2006. Visitors are all those visiting the Museum in person, including activities and events in the grounds. Users are all those using the Museum Service, including those on-site (visitors, as above); those off-site (attending a talk, display or other off-site activity by Museum staff) and those using the Museum 'remotely' (information, research enquiries and services by phone, fax, email, letter and website visits or 'Pageviews').

Year	Visitors			All Users	Notes
	Public	Schools	Total Visitors		
2006	15991	5979	21970	26736	Fund-raising for HQC
2007	15107	5459	20566	32413	Sealed Knot event in May
2008	13943	3553	17496	26964	Retirement of f/t Education Officer, break before post is filled
2009	13744	2472	16216	23759	Education Officer left in August, post frozen
2010	15172	1926	17098	25108	Museum's 175 th anniversary event attracted crowds. Learning Officer appointed in Sept for 2 days per week
2011	13634	2184	15818	24590	
2012	13253	2494	15747	26751	Sparks Will Fly event in May. Amalgamation of Visitor and Learning Services into one post

The table indicates while total users of the service (including website users) fluctuates around the 23,000 – 26,000, total visitor numbers have declined from around 20,000 – 21,000 per year to 15,000-16,000. This is partly due to the drop in school visits, from around 5,000 to 6,000 per year to between 2,000 and 2,500 since the reduction of the education officer post from full-time to 2 days per week. Other contributory factors have been a reduction in class sizes in some schools and a decrease in large groups travelling by coach, on account of increasing travel costs for school trips. Regular evaluation of school visits and holiday activities shows that this service is highly regarded with consistently excellent and very good rates of customer satisfaction. A small team of casual assistants and volunteers assist in delivery of activities and learning, but lack of staff-time and space prevent further expansion of school services and activities.

Some fluctuation in visitor numbers can be linked to specific special events; from 2001 to 2005, the average visitor numbers were steady at just over 14,000 per year, but intensive fund-raising and publicity for the Heritage Quest Centre in 2006 and the Sealed Knot 'Civil War' weekend in 2007 boosted visits to over 15,000. This pattern was repeated with the 175th special events in 2010, but not with Sparks Will Fly in 2012, when high attendance for this event was partly offset by lower July-August visitor figures. So the underlying trend has been a fall in visitor numbers by about 1,000 compared to pre-2006 levels, from 14,000-15,000 to 13,000-14,000.

The programme of special exhibitions (a mix of touring exhibitions and elements generated from the Museum's own collections) and related events is the other main draw for visitors,

both repeat visits from local residents and new visitors or tourists. The Museum and its collections appeal to a wide range of interests, and the Museum needs to offer a varied programme, so not every exhibition will be a 'family blockbuster' designed to bring in large numbers of family groups with young children. A balance between maintaining visitor numbers and appealing to a variety of audiences has to be struck. The special exhibitions gallery is relatively small, which places some restrictions on the type of exhibitions, interactives and exhibits, and cannot be closed off during exhibition changes because it is the route to other galleries and fire escapes. The need for a larger gallery to improve the presentation of special exhibitions is supported by the responses to the 2011 Public Consultation.

Another important issue is the difficulty of making substantial changes to the permanent galleries. Some of these are showing their age and it has not been possible for staff to keep up with revision and new additions to existing displays alongside the conflicting demands of collections management, public enquiries and activities, special exhibitions and fund-raising. This is an issue of staff capacity, and especially for the large local history and archaeology collections which scored most highly in recent public consultations. These are also the galleries most in need of re-display: the archaeology gallery will benefit from the deposition of recent excavation archives once the new store is completed and a more creative display of objects in themes and local stories. The local history gallery has insufficient space to show a wide range of collections, for example agricultural tools and equipment, or to update the story of the district and social changes from World War II onwards. Re-display of these core local collections could help to bring visitors in, especially from rural parts of the district if a greater range of local history could be accommodated. Some collections, notably local history photographs, are best displayed on touchscreen computers for visitors to browse. The popularity of the touchscreen computer in the Natural History Discovery Centre indicates the scope for extending the use of touchscreens into other areas.

Finally, there is no display space to regularly show recent acquisitions or invite local people to exhibit their collections, for example local metal-detectorists or organisations celebrating a special anniversary with a small display. Offering such opportunities and involving local people more directly the Museum might help to extend the range of local visitors and the feeling that the Museum reflects their community.

According to the 2005 Audience Development Study by ABL, some felt that the Museum could market itself more widely. With an annual advertising budget of £1,800 and the Visitor Services post now combined with Learning, marketing and publicity has to focus on basics. Smarter use of digital technology, including social media and 'apps', could extend the range of low-cost promotional tools, especially for younger and family audiences, and the Museum has already taken steps in this direction with Facebook and Twitter. Some people however, especially among older age groups who form a significant proportion of core visitors, may be reached more effectively by printed media and traditional forms of advertising. Feedback from evaluation of activities shows that some families look first and foremost to adverts in the local free press for 'things to do'. A major refurbishment of the galleries and extension of the Museum would offer opportunity for a re-launch and publicity drive, which should aim to capture email addresses of new visitors for the regular e-mailing list which the Museum has developed.