EUROPEAN ECONOMIC CHAMBER OF TRADE, COMMERCE AND INDUSTRY

European Economic Interest Grouping

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EEIG EU STANDARD FOR MUSEUMS AND GALLERIES
Revision April 2012

Aims of the Standard

1) To encourage all museums and galleries to achieve agreed EU standards in:

    a) how they are run

    b) how they manage their collections; and

    c) 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 EEIG EU Standards Certification 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 an EU standard, which strengthens applications for public and private funding and gives investors confidence in the organisation.

Eligibility

To be certified, 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 EEIG EU Standards Certification

1. **Organisational health -** 'EEIG Certified 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

1.7.5. Access to professional advice and input to policy development and decision making

1.7.6. Ensure skilled an trained staff – see appendix 1 for training skills checklist – recommend appropriate training for competencies

1.8. 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 -** 'EEIG Certified museums manage collections effectively and make them and the information they hold about them available to everyone.'

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

2.2. Satisfactory arrangements for the ownership of collections

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

2.4. 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.

2.5. **Collections management policies -** Development policy - The museum must have an approved policy for developing collections (also known as an acquisition and disposal policy). The policy must include:

2.5.1. the statement of purpose

2.5.2. an overview of current collections

2.5.3. themes and priorities for future collecting

2.5.4. themes and priorities for rationalisation and disposal

2.5.5. information about the legal and ethical framework for acquisition and disposal of items

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

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

2.8. Collections management plans

2.8.1. Documentation plan - The museum must have plans to improve its collections documentation and documentation systems.

2.8.2. 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.

2.9. Collections management procedures

2.9.1. 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.

2.9.2. 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 -** 'EEIG Certified 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 EEIG EU Standards Certification Committee

The EEIG EU Standards Certification Scheme is overseen by the EEIG EU Standards Certification 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 Europe. EEIG EU Standards Certification Panels, which are sub-groups of the committee, meet regularly to consider applications and returns. These decisions are reviewed at annual EEIG EU Standards Certification Committee meetings.

The assessing organisations:

The organisations that assess museums for EEIG EU Standards Certification are Certified EEIG Quality Systems Assessors and Validators at the various EEIG National Offices. Certified EEIG Quality Systems Assessors and Validators can be registered after relevant training by EUROCOT – IIEM, the education & training commission of the EEIG. These assessors/validators assess each museum's application or return. The assessments are passed to the EEIG EU Standards Certification Secretariat at PO Box 40668, Larnaca 6306, Cyprus where they are processed, quality assured and scheduled to be presented to an EEIG EU Standards Certification Panel for final issue of Certification.

Keeping EEIG Certified status

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

Changes to the EEIG EU Standards Certification standard

Over time, the requirements for the EEIG EU Standards Certification 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 EEIG Certified museums will be given reasonable notice of the changes before they are expected to meet the revised requirements.

Changes to EEIG Certified status

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

If a museum fails to provide their EEIG EU Standards Certification returns within the timescale allowed it may lose its EEIG EU Standards Certification status.

A museum can ask to be removed from the EEIG EU Standards Certification scheme.

APPENDIX 1 – Staff Competency Training

LEVEL	COMPETENCY
2	CUECOR02C - Work with others
2	CUECOR03B - Provide quality service to customers
2	CUFSAF01B - Follow health, safety and security procedures
2	CULMS201C - Develop and apply knowledge of the museum industry
2	CULMS202C - Provide visitors with venue information and assistance
2	CULMS205C - Observe and report basic condition of collection
2	CULMS207C - Assist with the presentation of public activities and events
3	BCGCA2002B - Use carpentry tools and equipment
3	BSBADM305A - Create and use databases
3	CULMS003B - Move_store cultural material
3	CULMS407C - Install and dismantle exhibition elements
3	CULMS411C - Prepare display accommodation for cultural material
3	CULMS412C - Record and maintain collection information
3	THTFAT03B - Provide a site briefing or scripted commentary
3	THTFTG07B - Research and share general information on Australian indigenous cultures
4	BSBFLM412A - Promote team effectiveness
4	CUECOR04B - Deal with conflict and resolve complaints
4	CUEFIN02C - Manage a budget
4	CUEIND03B - Integrate accessibility principles into work practices
4	CUEOHS01C - Implement workplace health, safety and security procedures
4	CULMS005B - Research and generate ideas for exhibition concepts
4	CULMS007B - Design and develop interpretive displays
4	CULMS009B - Implement preventive conservation activities
4	CULMS011B - Develop a disaster preparedness plan
4	CULMS406C - Deliver information, activities and events
4	CULMS502C - Acquire_dispose of cultural material
4	CULMS504C - Organise and monitor exhibition installation_dismantling
4	CULMS506C - Plan and develop activities, events and programs
4	CULMS605C - Develop and implement procedures for the movement and storage of cultural material
4	CULMS610C - Research, describe and document cultural material
4	CUSGEN02B - Work in a culturally diverse environment
4	CUVADM12B - Work with arts professionals in an arts organisation
4	CUVADM13B - Research and critique cultural work(s)
4	CUVCRS03B - Produce computer-aided drawings
4	SRXHRM001B - Manage volunteers
4	TAADEL404B - Facilitate work-based learning
4	THTFME03A - Develop and update event industry knowledge
4	THTFTG14A - Prepare specialised interpretive content (cultural and heritage environments)

4	THTTCO01B - Develop and update tourism industry knowledge
5	BSBFLM503B - Manage effective workplace relationships
5	CUEFIN01C - Develop a budget
5	CUEOHS02C - Establish and maintain a safe and secure workplace
5	CULLB510C - Develop and maintain community_stakeholder relationships
5	CULMS609C - Develop policies and strategies
5	CULMS611C - Lend_borrow cultural material
5	CUSADM06A - Develop and implement an operational plan
5	THHGLE12B - Develop and manage marketing strategies
5	THHGLE22A - Manage risk
6	CUEFIN01C - Develop a budget
6	CUETEM09B - Manage diversity
6	CUSADM04A - Manage a major project
6	CUSADM05A - Develop and implement a business/strategic plan
6	CUSADM08A - Address copyright requirements
6	CUSADM09A - Address legal and administrative requirements
6	CUVADM08B - Develop and manage public relations strategies
6	CUVCON06B - Develop concepts for arts organisations or projects
6	THTSMA01B - Coordinate the production of brochures and marketing materials

APPENDIX 2 - 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, nontangible 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, 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 EEIG EU Standards Certification 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.