Accreditation Checklist

Documents you need to upload to Grantium:

☐ Governing document

☐ Organisational workforce chart

☐ Volunteer agreement

☐ *Forward or Business Plan covering current and next planning year

☐ Budgets for current and next financial year (can be included in Forward/Business Plan)

☐ Audited, signed and approved accounts for previous two financial years

☐ *Collections development policy based on ACE template

☐ *Documentation policy or statement

☐ *Care and conservation policy or statement

☐ *Access policy or statement

Additional documents that may need uploading, if applicable:

☐ *Terms of reference of managing committee

☐ Organisational chart of managing committee

☐ *Mentor agreement

☐ Mentor report

☐ Loan agreements (if more than 50% of the collection is on loan)

* Requires evidence of signed approval. This may be a signed copy of full or redacted minutes, an extract from minutes, a published document (local authorities) or signed statement from appropriate individual. 'Signed' can be an actual signature, photocopy or scan of an actual signature or an identifiable email from an appropriate individual. See page 17 of the Accreditation Guidance for more information about signed approval.

Documents you need to have available on request:

☐ Security review and risk assessment

☐ Emergency plan

☐ Documentation procedural manual

☐ Documentation plan

☐ Care and conservation plan

☐ Access plan

☐ Audience development plan

Other documents you may have and wish to upload:

☐ Learning plan

☐ Marketing plan

N.B. Where appropriate, policies and plans may be included in the Forward or Business Plan. It can be helpful to link policy and plan together in one document, eg Care and Conservation Policy and Plan, **or** group collection policies together in one collections management framework. We would recommend the Emergency Plan is a separate document.

Review dates: Accreditation requires all policies and plans to be reviewed **at least every 5 years**. We would recommend sooner than this if there are significant changes within the organisation. It can also be useful to stagger review dates so that you don't have to tackle all of them at once.