



Resilience Roadmap

For museum and heritage organisations

How resilient is your museum? Could it recover from a sudden and unexpected event that disrupted your activities? What does being resilient look like?

The Resilience Roadmap from Hayes Parsons Insurance Brokers is designed to help museums review current approaches and assist with questions which may not have been fully considered, to find out how you can be best prepared to deal with the unforeseen.

The roadmap assists with topics and thoughts which helps museums consider broader risks faced aiding creation of relevant policies and procedures. It can also help protect vital income streams. Heritage Lottery Fund and other funders have a greater focus on organisational resilience when deciding which bid applications are successful so the roadmap will also help identify where further attention may be required before applications are submitted.



How to complete the Resilience Roadmap

1. Answer all questions by selecting either yes, no or unsure/we do part of this
2. Add together the three column totals to get a total score for that section
3. Use your total score to review the comments section
4. For any further guidance speak to Hayes Parsons Insurance Brokers. You can contact us via email on aim@hayesparsons.co.uk

People

You have a duty of care to all trustees, staff, volunteers, and members of the public. How are you managing this duty?

	Yes	Unsure/we do part of this	No
Do you have the expertise within those running the museum; covering finance, risk management, project management, HR, social media, communications, and technology?	3	2	1
Are they insured for decisions made in their personal capacity?	3	2	1
Are Trustees and/or Directors and/or Managers provided with training and ongoing information in relation to their corporate, legal, and fiduciary duties and are they clear in what is expected from them?	3	2	1
Do volunteers undertake the same basic training as staff, including induction training and additional where relevant for their roles?	3	2	1
Is such training documented and signed?	3	2	1
Do volunteers understand what role they play in achieving the museum's aims?	3	2	1
Are activities and people's roles risk assessed with suitable documentation held, and reviewed periodically?	3	2	1
Are accidents reported and logged and where appropriate are accidents investigated, including 'near misses'?	3	2	1
Is a competent person in place to oversee this process?	3	2	1
Where skills gaps may exist in relation to the above themes, is the museum able get assistance from other parties in the spirit of collaboration and cooperation?	3	2	1
Column total			
Total people score			



People

Total people score	Comments
21 - 30	<p>You have a good understanding of the risks you face and have appropriate policies and procedures in place to address these.</p> <p>Ongoing reviews where circumstances change is recommended.</p>
11 - 20	<p>You have solid foundations in place to protect your people from injury or from personal liability in relation to decisions taken as a director or trustee.</p> <p>You may have some procedures and activities risk assessed and documented. A review of these with your own risk advisors is advisable.</p>
1 - 10	<p>Additional work may be required to ensure all duties and obligations placed upon the museum are understood, including checking adequacy of insurances.</p> <p>Your ability to communicate effectively with your audience, and internally, in a crisis situation may be impacted by a lack of relevant skills.</p> <p>Your ability to defend injury claims may be limited without a system of up-to-date documented risk assessments.</p>



Property & assets

Property is critical to operations and income. How would you manage without it; what is the plan; could you manage?

	Yes	Unsure/we do part of this	No
Does the museum have a business continuity plan?	3	2	1
Does the plan extend to include robust plans for key people to undertake certain tasks with pre-arranged agreements in place with third parties to respond?	3	2	1
Do you have a system of proactive and reactive maintenance in place with necessary funds for remedial works readily available?	3	2	1
Is there a process of daily and weekly property checks, which is logged and recorded?	3	2	1
Is the fixed electrical wiring checked by a competent person every 5 years (with any resultant recommendations implemented)?	3	2	1
Are all plant and machinery inspections undertaken to meet statutory requirements?	3	2	1
Do you have documented procedures for asbestos management, legionella risk management, control of contactors (including Hot Work Permits) and other relevant risk controls?	3	2	1
Are professional valuations obtained every 3 - 5 years for buildings, collections, antiques, and valuables?	3	2	1
Do you know where your insurance sums insured originated?	3	2	1
Do your insurance sums insured meet your asset register and do they feel right?	3	2	1
Column score			
Total property & assets score			



Property & assets

Total property & assets score	Comments
21 - 30	<p>You have a good understanding of the risks you face and have appropriate policies and procedures in place to address these.</p> <p>Ongoing reviews where circumstances change is recommended.</p>
11 - 20	<p>You have procedures in place to meet your minimum legal requirements as a property owner. These procedures may focus on preventing incidents occurring in the first place.</p> <p>Additional activity focusing on likely responses to major property losses should be considered.</p>
1 - 10	<p>You may be in breach of certain duties in relation to property ownership.</p> <p>You may also be at risk of underinsurance and potentially lacking clear plans on how to react in the event of a major loss or crisis.</p> <p>A review of any obligations within your current insurance policies should be undertaken.</p>



Reputation

Many museums rely on the goodwill of others. Would your ability to operate be impacted by reputational damage?

	Yes	Unsure/we do part of this	No
Have you taken steps to manage situations where there has been injury?	3	2	1
Are there processes in place to investigate why injuries happen and a willingness to learn and adapt?	3	2	1
Do you have experience in managing public relation matters specifically regarding negative press or allegations of libel or slander?	3	2	1
Do you have the skills in-house to deal with any public relation matters via social media?	3	2	1
Would the museum's ability to raise funds and carry out activities be adversely impacted by reputational damage such as claims for breach of trust or adverse press coverage?	3	2	1
Would the museum be able to manage such reputational damage so it would not impact fundraising or grant applications?	3	2	1
Do you have a plan to maintain contact and awareness with volunteers and the wider community in the event of a major loss or crisis?	3	2	1
Is your membership and volunteer data correct and is it being handled in accordance with GDPR?	3	2	1
Have potential reputational risks been identified and documented with appropriate steps taken to manage, mitigate or insure against?	3	2	1
Are staff and volunteers provided with training and guidelines in relation to their online and offline conduct or activities?	3	2	1
Column score			
Total reputation score			



Reputation

Total reputation score	Comments
21 - 30	<p>You have a good understanding of reputational risks and have appropriate policies and procedures in place to address these.</p> <p>Ongoing reviews where circumstances change is recommended.</p>
11 - 20	<p>You have identified the key risks of reputational harm and how this might impact your museum.</p> <p>Further work could focus on transferring such risks to an insurer and building relationships with external companies who could support you following a major loss or crisis.</p>
1 - 10	<p>An incident of reputational harm such as an injury to a member of the public could impact your ability to raise funds.</p> <p>Your ability to remain engaged and relevant to your local community following a major loss or crisis may suffer without a clear policy in place.</p> <p>You may not have the necessary skills in-house to manage negative press.</p>



Business continuity

Museums with robust documented business continuity procedures are best placed to recover following a crisis. How relevant are your procedures?

	Yes	Unsure/we do part of this	No
Does the museum have a business continuity plan?	3	2	1
Does your plan extend to include robust plans for key people to undertake certain tasks with pre-arranged agreements in place with third parties to respond?	3	2	1
Does your plan have a documented process for crisis communication which includes mitigating impact on key customers, third party suppliers, volunteers and staff, funders, and the wider community?	3	2	1
Are staff fully trained and provided with the correct equipment to work remotely?	3	2	1
If you cannot work remotely, are there alternative plans in place?	3	2	1
Is all sensitive data and work in progress routinely backed up?	3	2	1
Do you have the requisite skills to maintain, test and review your business continuity plans annually?	3	2	1
Do you have the skills and resources to carry out a business continuity review on the ground (as opposed to simply doing a desk top review)?	3	2	1
Do you have plans in place for emergency fundraising in addition to holding of ring-fenced contingency funds to cope with the additional costs that may be incurred following a major loss?	3	2	1
Is the financial impact of a potential crisis noted and planned for?	3	2	1
Column score			
Total business continuity score			



Business continuity

Total business continuity score	Comments
21 - 30	<p>You have a good understanding of the risks you face following a major loss or crisis and have appropriate policies and procedures in place to address these.</p> <p>Ongoing reviews where circumstances change is recommended.</p>
11 - 20	<p>The fundamentals of business continuity are in place.</p> <p>Additional work to ensure all key stakeholders are familiar with the plan is recommended in addition to identifying any key skills that may be missing, for example social media or project management.</p>
1 - 10	<p>Building resilience is about prevention, preparation, and response. Additional work may be required to map out the key people, actions and procedures that need to be in place to ensure the Trust can respond in a crisis.</p> <p>Working through theoretical crisis scenarios can be a useful way of starting your business continuity plans and can help you to think about what could go wrong before it goes wrong.</p> <p>Your insurance advisors should also be able to assist in this process.</p>

About us

Hayes Parsons Insurance Brokers is an independent, Chartered insurance broker and risk management advisor based in Bristol, representing museums and heritage organisations all over the UK. We have been a corporate member of the Association of Independent Museums for several years and have experience working with all manner museums and their unique activities and collections.

You can find out more on our website - hayesparsons.co.uk/museums-and-visitor-attractions

Get in touch

To find out more or for further advice on improving the resilience of your museum, get in touch with our museum and heritage experts, Ben Leah and Mark Rose:



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