



# Understanding Your Role

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## Role

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As a MAP Surveyor, your role is to be a supportive colleague, assess the museum's operations, and make constructive and achievable recommendations for change. You are expected to provide constructive criticism, but not to make judgments.

As such, you will

- review the museum's performance in the context of its mission and resources
- compare its operations to the standards and best practices of the museum field
- recommend potential strategies for dealing with challenges
- balance the museum's stated need with your professional determinations of its most critical issues.
- share information about ways similar institutions operate
- identify resources the museum can use to reach its goals

When you communicate with the museum's staff, make sure they understand the purpose of a MAP assessment and that you will keep their information confidential. Information you obtain through the MAP process should never be attributed to a specific person in oral or written communications.

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*Reviewer maintained confidentiality in all communications and treated all information appropriately to maintain rapport and trust with participants.*

Frequently the museum's director, governing authority, and staff and the peer reviewer all approach the assessment with the same expectations and understanding. However, you may encounter small and large surprises throughout the process. If your discussions on site are frank and open and you are familiar with the museum's materials, MAP's

expectations, and your role, you will be prepared for most situations. Contact the MAP staff and/or peer reviewer manager if you become uncomfortable or are unsure about how to proceed.

## Time Commitment

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Your time commitment for this assessment will depend on your work style and the complexity and size of the participating museum. However, many Surveyors spend up to 40 hours on preparation, conducting the site visit, and writing the Assessment Report. If you think you might need to commit more than 40 hours, review the scope of the assessment and AAM's expectations to refocus your efforts. Or call the peer reviewer manager or MAP staff for guidance.

## Steps in the Process

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The steps in this process are described in more detail in the following pages of this manual. To conduct a MAP review, you

- review the museum's documentation
- schedule the site visit
- notify MAP staff of the visit date
- develop a visit agenda in cooperation with the museum
- visit the museum
- review plans to implement recommendations with the museum staff
- write an Assessment Report that reviews overall operations, addresses issues of major concern, offers constructive suggestions for change, and praises the museum's achievements
- submit the report to MAP staff on time, identifying any documents that the AAM Information Center might use as examples of best practices
- maintain an ongoing relationship with the museum (optional)

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## Assessment Differences

Each assessment has its own unique focus. The focus is reflected in each assessment's **Critical Issues Checklist** (see page C3), which guides your efforts throughout the review. In addition, some assessments use one Surveyor for the peer review portion; others use two.

### Collections Management Assessment

#### One Surveyor

Collections Management Assessment helps the museum review how the collections are managed and whether the appropriate finances are dedicated to their well-being. It focuses on collections policies, planning, access, documentation, and care within the context of the museum's total operations.

### Governance Assessment

#### One or Two- Surveyor Team\*

Governance Assessment helps the museum's governing authority examine its structure, roles, and responsibilities. It enhances the ability of the governing authority to advance the museum's mission and engage in effective planning.

\*During the 2003 & 2004 grant years, MAP is testing out two models of peer review for this assessment.

- one Surveyor who is the director of a museum and has experience serving on the governing authority of a nonprofit organization.
- a two-Surveyor team from the same museum—the director and a member of the governing authority.

### Institutional Assessment

#### One Surveyor

Institutional Assessment provides the framework that allows a museum to step back and take a look at its entire operation and can be used as the basis for a strategic plan that can guide future activities. It reviews mission and planning, governance, administration, finance, collections stewardship, interpretation and presentation, marketing, public relations, membership, and community support.

### Public Dimension Assessment

#### Two-Surveyor Team

Revised in spring 2004, Public Dimension Assessment helps a museum communicate and collaborate effectively with the public regarding its collections, research, and interpretive activities. It includes a review of all the ways in which the museum interacts with its audiences, including marketing, public relations, audience development, and exhibitions.

#### Two-Surveyor Team

A Surveyor Team must think and act collaboratively during all aspects of the assessment. Each team member is responsible for ensuring that the site visit occurs smoothly by reviewing the museum's self-study and documentation beforehand, participating fully while on site, drafting the Assessment Report, and maintaining the highest professional conduct. Although both team members participate equally in the assessment, one Surveyor is designated the "team contact." MAP staff will determine which Surveyor is the team contact when they confirm the assignment.

As a team, work together to decide how the assessment will be conducted. You may want to participate in all tours and meetings together or to divide assignments and compare notes later. It is particularly important to decide how you will collaborate on the writing of the report.

The **Team Contact** serves as the official contact between the Surveyor team, the museum's Assessment Team, and MAP staff. Specific responsibilities include:

- arranging the visit dates and developing the agenda with the museum contact;
- informing MAP staff of the visit date.
- taking primary responsibility for the timely completion of the Assessment Report;
- submitting the Assessment Report to MAP staff by the deadline.



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The **Team Member** completes the team, ensures objectivity, and is responsible for:

- helping the team contact schedule the visit and develop the agenda;
- ensuring that the team follows the agenda during the site visit;
- contributing to the Assessment Report.

Generally, the team participates in each component of the visit together. For large and/or complex sites, divide the responsibilities with your team member in advance.

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*Responsibilities for the visit (preparation, agenda development, site-visit activities, follow-up, and report-writing) were negotiated with the team member and divided according to the abilities and strengths of each partner.*