



Conducting the Visit

Role of the Visit

The questions you ask, discussions you hold, and recommendations you make on site set the stage for future museum growth and your report's incorporation in that process. Use the Critical Issues Checklist (page C3) to focus your thinking during the site visit, comprehensively review institutional operations, and emphasize strategic issues.

Initial interview with the director

Set the tone for the visit by stating the purpose of the visit and your role. Emphasize the confidential nature of the information gathered during the visit and that you are there to help the museum advance its own operations. Review the agenda and make any necessary changes. Review the museum's objectives for the assessment.

Tour the entire facility

Use the tour to get a full picture of the museum's physical resources and how they are used and maintained. Observe whether facilities are:

- well maintained
- safe and accessible
- adequate to fulfill the museum's mission

Meet with the Assessment Team

Use the meeting to:

- set a collegial tone for the visit
- clarify the museum's reasons for initiating MAP
- review the museum's expectations for the assessment
- request additional supporting documents, if necessary

Meet with all staff or key staff

Use the one-on-one or departmental meetings you

have scheduled to:

- learn more about how the museum operates
- ask questions that arose during your reading of preparatory materials
- explore the range of views regarding the museum's mission, plans, weaknesses, and opportunities
- ask people about their vision for the museum
- solicit their best ideas for improving operations

For a Governance Assessment

- Learn more about how museum governance affects museum operations and the staff's ability to do their jobs.
- Understand the ways in which staff interface with the governing authority, how they contribute to the work of the governing authority, and vice-versa.
- Solicit the staff's ideas for improving museum governance.

Meet with museum staff and the governing authority as a group to help participants:

- understand what to expect from MAP
- feel they have a role in determining the outcome of the assessment
- build teamwork
- reinforce a sense of common mission and involvement
- gain a broader perspective of their institution
- understand how the museum measures up to museum standards and practices

The meeting also can provide you with information about the dynamics of the museum.

Meet with governing authority members

When meeting with governing authority members, explore their understanding of:

- their roles as trustees of a nonprofit organization
- the museum's mission and performance
- the MAP process and how they will use the resulting information

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For a Collections Management Assessment

Examine their understanding of their responsibilities as stewards of the collections.

For a Governance Assessment

If possible, meet with the key governing authority members and/or the full governing authority to determine their concerns regarding museum governance.

For a Public Dimension Assessment

Ask about the institution's role in serving its audiences and community.

Your feedback, observations, and the resulting dialogue at these meetings can help the governing authority:

- gain a broader perspective of the institution
- understand how the institution measures up to national museum standards and practices

For a Governance Assessment

- broaden their understanding of museum governance
- explore ways in which they can improve governance



Consider meeting with the full governing authority at the end of the site visit to hear their comments on the MAP process.

Assessment-specific components

Governance Assessment

- Meet with the director to explore his or her:
 - perspective on the museum's governance
 - concerns or questions regarding the assessment
 - working relationship with the governing authority
 - ideas for improving museum governance
- Meet with head of governing authority to explore his or her:
 - perspective on the museum's governance
 - concerns or questions regarding the assessment
 - working relationship with the director
 - ideas for improving museum governance

- Meet with support organization(s), if applicable
 - Include representatives of supporting groups and individuals that have a significant influence on governance. Check Section One of the museum's self-study for a list of influential forces.
- If applicable, talk with your team member
 - Discuss your observations.
 - Compare notes and discuss any concerns that might require a follow-up review of the facilities or further discussion with staff.
 - Determine whether further meetings, documents, or visits are needed to complete the review.

Public Dimension Assessment

- Observe public use of museum facilities and interaction with museum staff. Consider scheduling time to visit the museum—unannounced and prior to the formal site visit—as public visitors to observe the museum's public dimension.
- Tour nearby attractions.
 - Observe the competitive environment in which the museum operates.
 - Compare the museum's signage and advertising to those of its competitors.
- Talk with your team member.
 - Discuss your observations.
 - Compare notes and discuss any concerns that might require a follow-up review of the facilities or further discussion with staff.
 - Determine whether further meetings, documents, or visits are needed to complete the review.

Additional visits/interviews, as necessary

Exit interview with the director/Assessment Team

Use the exit meeting(s) with the Assessment Team and/or the museum director to:

- check facts and clarify ambiguous points
- summarize your observations
- offer initial ideas about the focus and content of your Assessment Report



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- discuss the museum's plans for disseminating the Assessment Report, reviewing assessment findings, and implementing changes
- confirm that you will submit your report to MAP within six weeks, and that MAP staff will review the report and forward it to the museum within one month of receipt



The exit interview should touch on your major concerns and recommendations. The report should contain no surprises for the director.



Ask for a complete list of staff and governing authority members to make sure all names are accurate in your report.