

# Assessment Report

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## Audience and Purpose

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**Your Assessment Report will be the permanent record of the museum’s participation in the program and will be available to the institution in the years and decades to come. A fair and balanced report based on specific observations, critical thinking, and a collegial approach will contribute to the institution’s growth and development.**

### Purpose

Though the report marks the end of the process for you, it is the beginning of the implementation and change phase for the institution. Its usefulness and credibility will determine how effectively it can meet the museum’s needs.

Many museums use the report to:

- guide institutional planning
- prioritize needs
- catalyze change
- guide institutional growth and development
- affirm what things they are doing well
- orient new staff and governing authority members
- identify the museum’s needs to potential supporters



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*To focus the writing process, during the exit interview, ask the director/Assessment Team about their plans for the report.*

### Audience

The museum is the primary audience for the report. However, it may choose to share some or all of the report with a wide variety of audiences, including current or future:

- staff
- members of the governing authority

- donors and potential funders
- community leaders
- other stakeholders



*Report is an effective record of the visit and communication tool for other audiences. Report meets the needs of the program and its intended audience.*



*Sample reports and excerpts of reports may be found on the peer review section of the AAM Web site; [www.aam-us.org/peer-review](http://www.aam-us.org/peer-review)*

## Organization, Tone, and Writing Style

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### Organization

The report should include the elements listed below. Most reviewers use 15-25 double-spaced pages to cover the full scope of the review.

#### Introduction

State here when the visit took place, whom you met (if needed, a longer visit agenda can be included as an attachment), and the museum’s goals for the assessment. The Introduction or Executive Summary also should include the museum’s mission as it is the keystone for much of the report’s analysis.

#### Executive Summary

Briefly review your significant observations and most critical recommendations. Include both positive remarks and constructive criticism. This may be the only piece that governing authorities, funders, or other outside individuals read.

#### Brief Institutional History

To place the visit in the institution’s historical and physical context, include a brief description of the museum’s current situation and important elements from its past.

#### Body of the Report

There is no “right way” to organize the report; the



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important thing is to identify each topic clearly and ensure that recommendations and resources are easy to find. Headings, italics, bold type, and bulleted lists all will help make the report easy to read, understand, and use.

## Summary

At the end of the report, sum up your major observations and recommendations. Often reviewers group their recommendations to help the museum determine how it might implement them.

Examples of organizing strategies include:

- by priority: high, medium, low
- by time frame: short-term, long-term
- by resources required: low cost, medium cost, high cost

## Attachments, Appendices

If the main text does not cite resources or references to support your recommendations, consider attaching a list of articles, organizations, Web sites, and other useful resources.

You may choose to include examples of documents from your own institution.

Send the attachments themselves directly to the museum and a list of what you've sent to AAM.

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*e* Report is written and organized so information follows a logical order and is easy to reference. Report incorporates program format. Only a few minor changes by staff required.

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*e* Report generally uses the recommended format or deviates in a thoughtful and effective way. Report organization supports the understanding and use of the information (e.g., sections and headers).

## Tone and Writing Style

A successful report is not only correct, it is influential. When making recommendations or criticizing existing practices, **ask yourself, "How can I express this in a way that has the greatest influence on the staff and governing authority?"** A recommendation seen as overly critical or biased towards a group or individual undermines its own effectiveness. You may want to soften a criticism to increase the likelihood that the report will have a positive effect on the behavior of the staff and governing authority. MAP staff and the peer reviewer manager are available to read a draft or discuss issues of concern.

Reports are most effective in influencing the museum when they are:

- concise
- diplomatic
- practical and realistic
- motivational
- balanced in analysis, combining praise and constructive criticism
- written for a broad range of audiences (staff, governing authority, and other interested parties)

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*e* Report makes a balanced presentation of the strengths and weaknesses of an institution. The report avoids criticism of individuals.

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*e* Suggestions and recommendations are provided in a constructive manner and are effectively incorporated in the report.

## Content

The Critical Issues Checklist for each assessment (page C3) provides the outline for the report's content. The report also is guided by two goals.

- MAP's goal is to  
—provide a comprehensive review of a museum's operations from the perspective of the specific assessment

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- relate those operations to current standards and best practices in the field
- provide constructive and achievable recommendations to the museum along with supporting resources and references
- The participating museum's goal is to
  - obtain an accurate description of the institution's current state from an outside, knowledgeable museum professional
  - obtain a comprehensive analysis of the strengths and weaknesses of the museum's operations
  - address the specific issues unique to the museum at this point in time, based on the goals in its application and self-study and identified on site

### Meeting the Program's Purpose

#### *Comprehensive Review of Operations*

Present a full picture of the museum, touching on all areas of operation. While the Critical Issues Checklist provides the basic content areas, you can be flexible when constructing the actual report. Some areas may only need a few paragraphs to describe the current activities; you might provide positive feedback for work well done or acknowledge challenges but place them in low priority. Other areas may need a few pages to describe concerns in great detail, outlining specific suggested action steps and available resources.

Throughout the report, keep the focus on the museum's long-term sustainability by "connecting the dots" between areas of operations or issues.

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*Report provides insight into the underlying structure, operations, and issues of the institution.*

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*Program materials and requirements are effectively incorporated into the report.*

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*Report covers the complete range of operations included within the scope of the review.*

#### *Standards and Best Practices*

The museum expects you to bring an outside perspective to the review and place its operations within the larger context of the museum field and the appropriate discipline. As you describe the museum's current operations and analyze its strengths and weaknesses, refer to appropriate standards and best practices to provide the larger context to the museum.

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*Report analysis is consistent with standards and best practices. Recommendations are well justified.*

#### *Constructive and Achievable Recommendations*

**The recommendations you provide will only be helpful if they reflect the institution's resources, abilities, and stage of institutional development.** If you have a suggestion that the museum is not ready to implement, consider explaining how it might get ready. Too many recommendations or those that are too difficult to implement might discourage rather than challenge and energize a museum's staff.

Suggested resources might include:

- bibliographical suggestions with information on where to find these resources (including Web sites)
- networking opportunities for staff members (state and regional associations, AAM's Standing Professional Committees, other professional organizations)
- professional development for staff and board (if possible, suggest specific upcoming training opportunities in the area)
- sample documents and articles

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*Recommendations acknowledge and are appropriate to the museum's interests, available resources, and stage of institutional development. Recommendations are useful in institutional planning.*



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## Meeting the Museum's Purpose

### *Analysis of Strengths and Weaknesses*

MAP's fundamental premise is to help museums understand their strengths and weaknesses in relation to their abilities to achieve their stated mission. Museums can then work towards improving their practices and can appreciate their achievements. Your analysis should be supported by specific observations and concerns, described as concretely as possible. Be careful to focus your concerns and observations on the institution and not on any specific individual.

The report should have an overall positive approach. The museum should feel energized and ready to tackle its challenges. (See Organization, Tone, and Writing Style, page C26, for more details.)

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*Report identifies an institution's operational strengths and weaknesses with sufficient depth and analysis to support planning and decision-making.*

### *Comprehensiveness*

MAP asks you to make a comprehensive review; in addition, the museum looks for a report to be understandable to a wide audience. Therefore, you should provide sufficient description and context for your analysis and recommendations to allow outsiders to understand both the museum's operations and your recommendations.

Avoid using jargon and/or provide definitions for words that may be unfamiliar to non-museum audiences.

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*Language and description is sufficient to give someone who did not participate in the site visit a clear picture of the institution.*

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*Report provides a whole and accurate picture of the museum's unique operations with thorough analysis that meets the program and institution's needs.*

### *Museum-specific Issues*

MAP is a personalized program; the participating museum's concerns and issues are as important to the process and the report as the program criteria. Throughout the report, refer to concerns identified by the governing authority and staff in the application, self-study, and during your visit as well as other issues you feel are important.

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*Report incorporates the issues and circumstances unique to the participating institution throughout the report.*

## Reviewing for Accuracy

Please double-check all facts and proofread the text carefully. Changes in wording can turn an aggressive comment into a constructive recommendation. Small errors, such as misspelling a staff member or museum donor's name, can undermine the credibility and effectiveness of an otherwise excellent report.

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*Report language is clear and ideas are easy to identify and understand.*

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*Report contains only a few minor errors that were easily corrected by MAP staff.*

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*Report does not include inaccuracies or misrepresentations related to the museum under review.*

## Submitting the Report

### **Format**

When submitting your report to the MAP office, please include the following:

- the report
- a cover memo to MAP staff. This is the place to

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describe any unique circumstances that provide context for the report; the museum will not see this document.

- a list of attachments provided to the museum (MAP staff do not need to see the attachments, but a list is informative. Send any attachments directly to the museum.)

Please submit the above electronically (via e-mail to [map@aam-us.org](mailto:map@aam-us.org) or via diskette to the address below), Microsoft Word preferred. If you are unable to submit the report in this format, call the MAP office (202/289-9118) to work out alternatives.

Museum Assessment Program  
American Association of Museums  
1575 Eye Street N.W., Suite 400,  
Washington, DC 20005

### Deadline

Your final report is due to the MAP office six weeks after the site visit. It is crucial that you meet this deadline. AAM has found that if more time than this elapses, other priorities begin to claim your attention and time, the currency of the report's information decreases, and the museum's momentum and enthusiasm begin to drop. Writing the report soon after the visit will keep your memories fresh and lead to a more specific and stronger document.



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*Shortly after the end of the visit, write down your initial thoughts, starting an outline from which you can build the report. This helps keep your ideas fresh and gives you a place to start when you sit down to write. You may want to do this right after the exit interview, on the trip home, or the day following the visit.*

MAP is committed to providing the report to the participating museum in a timely fashion, and the ability to fulfill that commitment rests in your hands. In addition, tardiness may compromise a museum's compliance with its IMLS grant. Please contact MAP staff if you are unable to meet the deadline.

If you are unable to complete a report, please let us

know as soon as possible. In such instances, MAP staff will match the museum with a new Surveyor as soon as possible and authorize a new site visit at AAM's expense. (See Fulfilling Your Responsibilities, for more details.)

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*Reviewer met all program deadlines within 15 business days or contacted program staff to discuss challenges or arrange for extensions.*



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*Consider sending a postcard to the museum when you submit the report to AAM. This informs the museum that work on its assessment is progressing and that it will hear next from AAM.*

### Revising the Report

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Writing the report is a collaborative process between the museum and you (and your team member, if applicable). The process does not end when the report is submitted to MAP staff, who read all reports and evaluate them according to the Evaluation Rubric (page E12).

After the MAP staff ensures that the report reflects the goals of the program, you may be contacted to:

- clarify certain points
- add additional analysis, recommendations, or resources
- approve minor changes to the report
- make substantive changes to tone or content

This review and revision process helps maintain the consistency of the MAP experience for all participants and is part of your commitment to the program