



Travel Arrangements and Logistics

The site visit is a professional business trip that typically includes transportation (airfare and/or car rental), hotel accommodations, and meals. All of your direct costs for the visit will be covered by the museum. You and the museum should agree to all travel arrangements in advance, particularly for any unusual or very high expenses, to ensure that the plans are reasonable, appropriate, and acceptable to both parties. Any limitations or plans for special events (e.g., receptions, dinners at a home, or group meals) also should be discussed. You are providing your time and knowledge to the museum and will need comfortable and reasonable lodging that will help you do your job. But you should not expect unusual or elaborate accommodations.

Refer to Site Visit Expectations Policy, page E10, for further details.

Establish Contact with the Museum

Once confirmed, the Team Contact secures the Team Member's participation and contacts the museum to determine the visit date, visit logistics, and the visit agenda.

Typically, visit arrangements are made with the institution's director. However, sometimes you may work with another staff person delegated to guide the museum through the review.

Setting up the visit in a timely manner is critical to keeping the museum on schedule throughout the process. If any serious challenges arise, please contact Accreditation staff.

Peer reviewer is responsive to museum & program staff, fulfills role effectively.

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

Establish Contact with Your Team Member

Prior to the visit, work together to establish and confirm the dates for the visit, determine the agenda, and, incorporating the strengths of each partner, divide responsibilities.

You and your team member should work together to ensure that the museum's written documentation is complete and current. Coordinate requests to the director to clarify or update materials, as necessary. The Team Contact should serve as the official contact person between the team and the institution under review.

Responsibilities for the review (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.

Schedule the Site Visit

The site visit should take place when:

- the director, relevant staff, and members of the governing authority are available;
- you have time to complete the report within four to six weeks of the site visit;
- the museum is open to the public.
- Accreditation visits for a museum undergoing capital projects should proceed in a timely manner rather than waiting for construction to be completed. (See Accreditation Commission Guidelines for the Visiting Committee: Conducting Site Visits to Institutions During Times of Transition, page E26)

Set Expectations

Most site visits go very smoothly and are a source of satisfaction for the peer reviewer, the museum director, and the governing authority. There are, however, occasional tensions. The most common

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sources of frustration reported by peer reviewers and museums are:

- conflicting expectations
- hesitation about openly addressing underlying issues or concerns
- lack of involvement of key staff or members of the governing authority

Clear, consistent, and regular communication helps to avoid these potential problems. **By clarifying the roles of the site visit and the peer reviewer in the accreditation review process, you set the stage for a successful visit.**

Role

Accreditation Visiting Committees provide the Accreditation Commission with information to aid its decision-making process. Visiting Committee members do not provide feedback or suggestions to the museum—in person or in the report—on how to improve operations.

(See Similarities & Differences: Peer Review, page B18, and the Accreditation Visiting Committee Position Description, page E8, for more details)

The contact with the museum is a great opportunity to address any gaps of information in the self-study and to assure the museum about the Visiting Committee's objectivity and confidentiality. It is also a good opportunity to:

- emphasize that you will be observing their operations, not providing a conclusion
- discover any complicating factors that may affect the site visit or the report
- emphasize the confidential nature of the information gathered during the visit

Visit Length

The appropriate length for a site visit depends on the size and complexity of the museum and its

governing structure. Please discuss with your museum contact and, if applicable, team member, the ideal time frame for accomplishing the goals of the review. Factor in any pre-visit and wrap-up team meetings, breaks, and meals. Typically, visits last two days (two to three nights).

Large museums, those with multiple sites, or those with multiple supporting groups or advisory boards may require a longer site visit. Adding an extra day to the visit may entail only a relatively minor additional expense on the museum's part.

Financial Arrangements

You may pay for your travel and be reimbursed, or have the museum make the arrangements.

If applicable, any travel costs you incur will be reimbursed by AAM, which will then bill the museum. Use the Visiting Committee Travel Reimbursement Form available from Accreditation staff or the peer review section of the AAM Web site (www.aam-us.org/peer-review). Submit your expense report with original receipts and signature to the Accreditation staff for reimbursement. Only reasonable expenses, accompanied by a receipt, will be reimbursed. If you prefer, airfare or other pre-paid expenses can be reimbursed prior to the site visit.