



Conducting the Visit

Role of the Visit

The Accreditation Commission expects the Visiting Committee to ensure that all aspects of the museum's operations are reviewed in a professional manner and discussed at a level that will enable the committee to develop an accurate, objective, and comprehensive narrative report. That, in turn, will inform the decision-making of the commission.

During the review, Visiting Committee members are prohibited from making recommendations or offering consultative advice. In addition, all information discussed and gathered during the course of a visiting committee assignment is considered strictly confidential.

Advice on how to remedy issues of concern or suggestions on how to change operations are not within the scope of Visiting Committee responsibilities and should not be offered.

Starting off

Before the committee arrives at the museum for the scheduled site visit, it is helpful if you:

- acquaint yourselves with one another
- orient yourselves before conducting the site visit
- compare notes and questions
- confirm the final agenda

★ *Consider one or both of the team members making an unannounced visit to the museum as a casual visitor prior to the start of the visit. This is a chance to see the public dimension of the museum.*

Initial interview with the director

During this interview, your team and the director:

- Set the tone for the visit by stating the purpose of your role during the visit; state the confidential nature of the information gathered during the visit; and emphasize that you will not offer any recommendations

or discuss your opinions about the Commission's decision.

- Review the agenda.
- Ask questions and clarify aspects of the review and the museum's operations.
- Gather and review any new information or documents. (The museum should make its copy of the supporting documentation and photographs available to the team for the duration of the site visit.)
- Confirm the availability of a private meeting space for the team's use.

★ *The Visiting Committee should use the private meeting space reserved for them by the museum director to review the supporting documentation, hold team meetings, and conduct interviews, if necessary.*

Tour the entire facility

Your tour of the museum's facilities and collections should include:

- galleries and other public spaces
- program departments, offices, and work areas
- collections, including storage and records
- workshops, meeting rooms, and laboratories
- grounds
- off-site collections storage
- ancillary exhibition areas, satellite sites, or branch museums included in the review

Use the tour to verify the museum's written record. The agenda should give committee members extra time to return to specific areas to confirm impressions and check details, if needed.

★ *During the tour, the team members should talk informally with the museum's staff. Check the accuracy of collection records by using files to locate a particular artifact. Ask staff about the museum's mission and values, planning objectives, or a particular aspect of the museum's operations.*

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Meet with individual key staff

Most of the team's time is spent conducting one-on-one or departmental interviews with staff. These interviews must be thorough and candid and should take place in private, without the director present, to provide an opportunity for open and candid discussion. During these interviews, the visiting committee should explore all functional and operational areas of the museum.

Meet with governing authority members

These interviews should take place in private, without the director present, to provide an opportunity for open and candid discussion. If more than one governing entity oversees the museum, schedule meetings with representatives from all of them.

Meeting with the governing authority allows you to:

- determine whether members of the governing authority understand their roles as policy makers, fiscal agents, and stewards of a public trust
- determine whether members of the governing authority are familiar with the museum's mission, planning process, ethical and professional practices, and their responsibility to provide the resources needed to meet the mission
- verify that there is clear and appropriate delegation of authority to the museum director for the museum's day-to-day operation
- gain an understanding of how the museum is governed in practice and whether this is concurrent with the written record
- discuss the importance of achieving and maintaining accreditation and ensure that the governing authority accepts full responsibility for a professionally operated institution

★ *If possible and appropriate, attend a meeting of the governing authority or one of its committees to determine how the museum's governing authority understands and fulfills its responsibilities.*

Meet with all staff or key staff

When possible, all the employees should be included. If the museum is a very large museum, you may choose to meet just with key members of the professional staff or department heads.

Meeting with the staff allows you to:

- clarify the purpose and process of accreditation
- acknowledge the staff's contributions toward accreditation
- answer any questions the staff may have about their review
- get a sense of staff morale
- explore with the staff how the museum fulfills its mission
- reinforce the staff's pride in their institution and the accreditation process

Talk with your team member

During the visit discuss observations with your team partner

- Compare notes and discuss any concerns that might require a follow-up review of the facilities or further discussion with staff before the end of the visit.
- Verify that the team has reviewed all areas of the museum's operations.
- Request any further meetings, documents, or visits needed to complete the review,
- Prepare for the exit interview with the director.



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Exit interview with the director

During the exit interview, the Visiting Committee should:

- Listen to the director's observations about the museum's experience with the accreditation process.
- Verify that the factual information it has gathered about the museum's structure and operations is accurate. The director may take this opportunity to provide clarification or explanation.
- Describe the Visiting Committee's general observations and cite any areas of significant concern without revealing your recommendation regarding accreditation. The report should contain no surprises for the director.

If you are not able to meet everyone that you need to, consider conducting phone interviews with key governing authority members or staff who were not available.

Final Visiting Committee meeting

This meeting, immediately following the exit interview, is essential and enables you to

- confirm general impressions
- compile an outline or draft of the narrative report
- cross-check and document observations while they are still fresh
- confirm that the museum's photographic documentation reflects the museum's facilities and collections
- clarify how each team member will contribute to the final report
- establish a timeline for exchanging drafts and completing the report by the deadline
- develop consensus and sign the Visiting Committee's Advisory Conclusion

If the Visiting Committee members cannot reach full agreement on a conclusion, the Team Contact should contact Accreditation staff before completing the narrative report.

Advisory Conclusion

The Advisory Conclusion form gives the Visiting Committee three options for advising the Accreditation Commission about its analysis of the museum. Think carefully about your committee's conclusion. The Accreditation staff and commission will expect the report to substantively and concretely support your advisory conclusion. The choices include:

- Grant Accreditation
- Table
- Withhold/Deny Accreditation

Granting Accreditation indicates

- No serious concerns.
- The museum meets the *Museum Accreditation: Criteria and Characteristics* and each of the Accreditation Commission's Expectations
- The museum's ability to meet its mission and advance its operations is not disabled by any major factors.
- The museum is aware of and actively engaged in mitigating and resolving any concerns in a strategic manner and with sufficient resources.

Tabling indicates

- There are specific deficiencies in the museum's operations that the museum will need to address before it fully meets accreditation requirements, for example,
 - needing a particular policy document
 - misaligned mission and operations
 - uncertain financial stability
 - needing realistic plans that outline timelines, resources, and responsibilities
 - systemic collections stewardship concerns
 - needing to change or fix a practice, policy, or facility

Withholding/Denying Accreditation indicates

- numerous serious concerns that are systemic and debilitating and cannot be addressed during a tabling period due to their complexity or the museum's capacity
- major changes are necessary to meet the *Museum*


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Accreditation: Criteria and Characteristics and professional standards, for example,

- a shift in institutional thinking
- garnering of outside support and resources
- strategic planning
- organizational change
- physical improvement

The commission often tables museums with very serious concerns. Frequently the commission is pleasantly surprised by the amount of work that can be accomplished during a tabling period.

Your and/or your team member may be contacted prior to the commission meeting if the commission has questions about your team's advisory conclusion. If the commission makes a decision that is different from the team's recommendation, the Team Contact will be notified of the decision, provided an explanation of the commission's decision, and asked to contact the team member.

 *Advisory Conclusion is in agreement with the description and analysis presented in the report.*

 *Please note that under no circumstances and at no time is the Visiting Committee to communicate its conclusions to anyone except the commission. Although the Visiting Committee may have reached a tentative conclusion regarding accreditation by the end of the site visit, discussion about the committee's conclusion with the museum's staff or members of the governing authority is inappropriate. Program policy stipulates that the Visiting Committee's conclusion is advisory and confidentially addressed, in writing, using the form provided, to the commission only.*