

Site Visit Expectations

Facilitating an Effective Visit

A site visit is a unique professional opportunity for both the museum and the peer reviewer(s). It also marks the culmination of much preparation and may be accompanied by high expectations and anxiety. Most visits go smoothly and are rewarding for both parties. Though problems are infrequent, AAM staff have noted a few that come up on a regular basis.

To help prevent some of these problems and to ensure that the visit is a positive one, AAM has developed the guidelines below. The key to success is maintaining a business-like relationship through open, clear, and complete communication throughout the review process—from the first contact until after the final report is submitted.

Travel Arrangements

The site visit is a professional business trip that typically includes transportation (airfare and/or car rental), hotel accommodations, and meals. The museum and peer reviewer 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) should be included in these discussions. The peer reviewer(s) are providing their time and knowledge; in return, they need comfortable and reasonable lodging that is conducive to doing their job, but should not expect unusual or elaborate accommodations.

For Accreditation, the museum covers all the expenses of the visit. AAM reimburses the peer reviewers' documented, out-of-pocket costs, and then invoices the museum for that amount.

For MAP visits, the museum is directly responsible for the expenses of the visit (the IMLS grant is used to defray these costs). Peer reviewers are reimbursed

directly by the museum for any documented, out-of-pocket expenses. The IMLS grant does not limit the amount that can be spent on travel and accommodations. Depending upon the institution's location and restrictions, the costs for reasonable travel arrangements may exceed this amount. In that case, the museum is responsible for any additional costs.

The Responsibilities of the Museum

For an effective site visit, the museum should:

- Work in collaboration with the peer reviewer(s) to develop a comprehensive and realistic agenda.
- Voice and negotiate expectations early on to avoid any possibility of misinterpretation.
- Provide additional materials upon request in a timely manner, make sure key staff and governing authority members are available for the visit, and provide access to all facilities as requested.
- Follow the set agenda on-site and negotiate any changes with the peer reviewer(s) to make sure that the changes still meet both parties' needs.
- Respect the time, knowledge, and experience of the peer reviewer(s).
- Provide open and candid responses to questions by peer reviewer(s).

When arranging travel, the museum should:

- Ensure safe, clean, and reasonably priced accommodations.
- Provide for accommodations in a commercial establishment. Lodging in private homes is not appropriate unless no other option is geographically feasible.
- Provide private space and time for the peer reviewer(s) to gather thoughts, prepare for following days, and capture the day's events in their notes.
- Provide for reliable transportation for all aspects of the visit.
- Provide for reasonable meal options during the visit,



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with attention to any communicated special needs.

- Tell the peer reviewer(s) about any restrictions the institution has regarding reimbursements for travel expenses—meals, mileage, lodging, etc.

For MAP, generally the museum pays for travel arrangements up front. If this is not the case, requests for reimbursement from the peer reviewer should be responded to within 45 days.

The Responsibilities of the Peer Reviewer

For an effective site visit, the peer reviewer should:

- Maintain a professional demeanor in any interaction with the museum's staff and/or board. Peer reviewers represent AAM in an official capacity and must conduct themselves accordingly in all business and informal situations.
- Initiate and collaborate with the museum to develop a comprehensive and realistic agenda.
- Voice and negotiate expectations early on to avoid any possibility of misinterpretation.
- Thoroughly prepare for the visit, including reading in advance all self-study materials and requesting and reviewing any additional materials needed.
- Respect the time, knowledge, and experience of the staff, governing authority, community representatives, and all others involved in the site visit.
- Follow the set agenda on-site and negotiate any changes with the museum to make sure that the changes still meet both parties' needs. Be prepared for a few glitches and respond to them graciously and creatively.
- Utilize thoughtful questions, gather information, and listen carefully.
- Remain diplomatic, fair, objective, and empathetic. Respect any and all confidences shared.
- Clarify and maintain the appropriate role for the visit: remain non-consultative for Accreditation; supportive for MAP (see position descriptions for more details on each role).
- Before departing, review with the museum any follow-

up work to be completed and methods for contact should there be additional questions or concerns.

- Remain aware of the impact of his/her position of influence as reviewer and the importance of maintaining integrity and credibility of the process. Developing a good rapport with the museum can alleviate feelings of anxiety. Accepting any gratuities and/or gifts of any substantive value from the host institution or their representatives is not appropriate.

When arranging travel, the peer reviewer should:

- Be considerate of the museum's resources throughout the visit, including travel costs, meals, accommodations, and transportation. The peer reviewer is in a position of influence and should not take advantage by incurring unreasonable expenses. Consultation with the museum in advance can minimize any confusion.
- Tell the museum if any of their suggestions are not reasonable, acceptable, or appropriate.
- Communicate to the museum any special needs (e.g., dietary restrictions, disability concerns, health issues).
- Expect private time and space during the visit. Meals or receptions as part of a visit can be an effective use of time, but a peer reviewer is not obligated to accept such engagements if s/he does not feel comfortable with the situation, or the situation does not seem appropriate or realistic.
- Expect to pay personally for any costs associated with accompanying guests/spouses or extending the visit for personal or other business reasons. Such expenses are not the museum's responsibility.
- Submit a reimbursement request for all reasonable and documented costs associated with the visit and expect a timely response (generally less than 45 days). For MAP visits, the museum directly reimburses these costs. For Accreditation, AAM reimburses the reviewer and invoices the museum.

If these expectations are unclear or help is needed in meeting them, please call AAM. If the museum or peer reviewer is uncomfortable or feels the visit is compromised, please contact AAM at 202/289-1818 during business hours (EST).