

What's the BIG IDEA?

This feature presents the history, theory or critical points of the theme to provide a broad context for the issue.

Effective Communication during Site Visits

Terrie Nolinke, Ph.D., Former Director of Education, Lincoln Park Zoo, Chicago, IL

Effective communication occurs when we share feelings or ideas, resulting in some type of mutual understanding. Accompanying gestures, the tone of voice, facial expressions, or the way we sit or stand influences how others perceive our message and us.

Each of us has a unique style of communication to which we must pay particular attention when conducting visits for the Accreditation Program or the Museum Assessment Program.

The visit's purpose also influences communication. Accreditation peer reviewers gather information and record observations to assist the Accreditation Commission in determining whether the museum meets the characteristics of an accreditable museum. MAP reviewers provide feedback and are more consultative and collaborative.

ESTABLISHING RAPPORT

Establishing rapport begins the minute you walk in the door and continues until your final goodbye. Any site visit is stressful, and it is the responsibility of the reviewer to put museum staff at ease—to begin with a friendly greeting and to be sincere and attentive throughout. Establishing rapport is not about control, expert authority, or power. It is about mutual respect and trust. Some techniques include explaining the site visit process, explaining any constraints when providing feedback, apprising staff that the only stupid question is the one that remains unasked, giving all museum staff complete and undivided attention, and eliminating all interruptions.

Convening in a comfortable, quiet meeting room helps people relax. Making eye contact helps establish a one-to-one relationship. Asking each individual what they are most proud to have contributed to the museum is one way to learn about individual agendas and passions.

This author uses “rules of the day” when teaching and applies these same rules during site visits. The rules encourage others to actively participate in and contribute to discussions. The rules are to listen to what is said and *how* it is said; to confine discussion to the topic at hand; for the speaker to own his view using “I” instead of “we” or “they”; to respect the views of

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THEME

This issue of *NEWSStandard* looks at some key elements of effective site visits.

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Please send submissions for *NEWStandard* to Peer Reviewer Manager, AAM, 1575 Eye St., NW, Suite 400, Washington, DC 20005.

What's the Big Idea

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others; to acknowledge and appreciate differences; to avoid sarcasm, blame, or attack; and to honor confidentiality.

Other ways to minimize barriers to communication are to use common language and avoid jargon, to speak at a moderate speed in an expressive voice heard by all, to create an environment of acceptance through genuine interest and focused attention, and to minimize anxiety through an unruffled approach that seeks to motivate and educate rather than to criticize.

GATHERING INFORMATION AND MAKING OBSERVATIONS

The best communicators are those who really listen and seek to understand. Reviewers might find active listening techniques helpful when gathering information. Reviewers might nod, make eye contact, or say “ummm, I see, or yes” to let the speaker know that attention is being paid. Reviewers might ask questions to clarify an issue or seek additional information. They can express support by saying “what a great idea” or disagree by saying “I believe the figures are actually higher” or by referring to the self-study document and clarifying discrepancies. Reviewers might paraphrase, restating the speaker’s message in his or her own words, to assure understanding. Listening to paraphrased thoughts provides a “time out” and helps everyone clarify their thoughts.

When gathering information and making observations, reviewers use questions to form connections between facts, thoughts, and feelings. Open-ended questions (ones that require more than a yes or no answer) are used to establish rapport, obtain information, or reveal feelings and opinions. Closed-ended questions (those that require

a yes/no answer or force a choice between two or more options) may provide missing information or necessary facts. Questions beginning with “why” may be quite enlightening, but must be articulated with care since they are often perceived to accuse or place blame.

Reviewers must remember that often there is no right or wrong response to questions they ask. Each response has a place, with one being more appropriate than another given the set of circumstances. Reviewers would do well to think about staff responses along a continuum of options. As information is gathered, reviewers should pay particular attention to the disconnects—those things that do not quite make sense or that might (should) be done differently (or not at all).

SHARING FEEDBACK

Communicating feedback to others can be very stressful—for both reviewer and museum staff. It requires sincerity, professionalism, and diplomacy. It requires that reviewers be honest without breaking the trust established with staff. Remember that a defensive listener is a poor listener!

Shared feedback should be fair and avoid bias. It should focus on facts and what was really observed, avoiding inferences and judgments. Feedback framed in relation to doing “more or less” of something removes it from the realm of being right or wrong and moves it along a continuum of possibilities. Feedback should stimulate museum staff to explore alternatives and select the one they believe to be most appropriate for their setting. Share it in a private environment with those who have both the responsibility and the authority to take further action, allowing

Welcome to My Place

Debbly Ellen Moone, Development Officer, National Museum of Civil War Medicine

it to be perceived as an offer not an imposition.

Be aware that excessive feedback can overwhelm while too little can minimize the importance of the message. Present feedback in discreet categories such as areas of strength, growth, or mandated change. Specificity, along with the reviewer's expression of confidence that museum staff can make necessary changes, is key to effective feedback.

Effective communicators demonstrate empathy for others. By recognizing and relating to defensive/stressful feelings that staff may have during site visits, the reviewer can take extra care in choosing just the right words at the right time. Keeping feedback balanced demonstrates fairness and objectivity.

Use of positive language can be an effective way to communicate, although reviewers need to take care that the message is not completely lost. Phrases can be used such as "We have identified areas of opportunity that will strengthen. . ." or "standards require that. . ." can be used. Very few things are "either/or." As a reviewer, seek out comments that are "both/and."

SUMMARY

It is your responsibility, as a reviewer in the Museum Assessment and Accreditation programs, to establish realistic expectations for the museum staff, to share professional feedback based on knowledge and mutual respect, to treat those around the table as partners not adversaries. And, it is your responsibility to make the site visit as educational, efficient, and meaningful as possible. Effective communication lies at the core of these responsibilities. ■

The National Museum of Civil War Medicine (NMCWM) in Frederick, MD, probably holds the record for hosting the most site visits by peer reviewers within a five-year period. Between June 1997 and June 2002, the NMCWM welcomed peer reviewers for the Institutional Assessment (1997), Public Dimension Assessment (1999), Governance Pilot Site (2001), and Accreditation (2002). The NMCWM also hosted peer reviewers in 1997 for the Conservation

Before our first MAP experience, some board members and staff felt apprehensive about the pending visit by our peer reviewer. They were nervous that the reviewer was going to be performing an inspection.

Assessment Program. As NMCWM coordinator for these programs, I can offer insight into the process from the perspective of a much visited museum.

The NMCWM opened its doors to the public in 1994. At that time, its staff consisted of a paid executive director, a paid (part-time) administrative assistant, and a small group of dedicated volunteers.

In August 1996 JaNeen Smith became executive director. There were two things Ms. Smith insisted on before accepting the position: that the board of trustees raise the funds to hire at least four full-time staff members and that the board be fully supportive of the museum's participation in AAM's Museum Assessment and Accreditation

programs. Fortunately, the board agreed to meet both of Ms. Smith's "demands."

I know I speak for the rest of the museum's staff as well as its board of trustees when I say the Museum Assessment Program is a priceless tool for institutions to use in achieving excellence in all of their operations. The NMCWM owes its success, in large part, to this program, and we cannot praise it enough.

The self-study process is extremely beneficial and allowed the staff and board to critically analyze their activities. This resulted in a redirection of the museum's resources to the areas most needing improvement. The visits by our peer reviewers, however, were certainly the most rewarding part of MAP.

Each of the peer reviewers did an outstanding job. They immediately established rapport with board and staff (both paid and volunteer) and demonstrated superb listening skills. They asked relevant questions, freely praised what we were doing well, and provided extremely constructive critique in areas where improvement was needed.

Before our first MAP experience, some board members and staff felt apprehensive about the pending visit by our peer reviewer. They were nervous that the reviewer was going to be performing an inspection. The executive director and I assured them that the peer reviewer was not an inspector but instead was a museum professional who was coming to help us meet our goal (Accreditation) by evaluating our activities and offering

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[On the Ground] What would YOU do if...

This feature incorporates the theme into the practical work of peer reviewers.

We asked members of the Peer Reviewer Advisory Committee to consider some hypothetical situations a peer reviewer might encounter that would challenge his or her effective site visit skills. The following is a selection of their responses. Click on the **NEWStandard: Current Issue Supplement** in the peer review area of the AAM Web Site (www.aam-us.org/peer-review) to read more answers, have a chance to submit your solutions, and to suggest other situations to be considered.

SCENARIO 1:

ORGANIZATIONAL CHANGE

During your initial meeting with the director, he reveals to you that when the museum staff completed the self-study the museum was under the governing authority and financial support of the municipal government, but just six weeks ago the museum was cut loose and are now must become a self-sustaining nonprofit organization.

SCENARIO 1 RESPONSES:

This important turn of events would definitely affect the consulta-

tion. As the peer reviewer, I'd try to get information about it as quickly as possible. First, I'd examine the museum's agreement with the city. I'd want to hear the board and staff's opinion about the situation. I'd try to determine why the city was dropping its support, if the severance was irrevocable, what kind of timetable there was, and whether an extended phase-out was an option. Another important factor to gauge would be the level of support for the organization in the community. A museum actively engaged in the community would

be in a better position than one viewed as irrelevant.

Next I would review existing planning documents and policies, as well as the information developed in the self-study, all of which should be useful starting points in helping the museum to evaluate the its potential for generating the financial and human resources needed to support the museum over the long term.

— Patricia Miller Executive Director, Illinois Heritage Association

Given this scenario, it seems that it would be very difficult to continue with an Accreditation visit under these circumstances, as the firm establishment (with all requisite documentation) of the institution would likely remain in question for some time. If this were a MAP visit, the Surveyor must consider honestly whether he is well equipped to advise the institution under these

On several MAP visits, it has been clear that decision makers (particularly at university museums) will listen to the outside consultant when they won't listen to their own staff.

circumstances. A call to AAM to discuss the matter would help determine whether and how to continue.

— Bradley Brooks, Director, Lilly House Operations & Programs, Indianapolis Museum of Art

SCENARIO 2:

PIVOTAL CHANGE PENDING

While planning your site visit, and reviewing the self-study materials, and you notice that the university-

HOT OFF THE WEB

The peer review section of the AAM Web site is becoming a key resource for peer reviewers. AAM will continue to increase the breadth and depth of the site to meet the needs of peer reviewers. "Hot Off the Web" will be a regular feature in *NEWStandard* devoted to announcing additions to the site, highlighting hot discussions from the past few months, and introducing new topics for discussion.

NEWStandard, a semiannual print publication, is a primary source of communication between AAM and peer reviewers, but more time-sensitive updates are communicated via e-mail. If you did NOT receive an e-mail in January from Karen

Bellnier regarding *Evaluating Governance: A workshop for AAM Peer Reviewers* at the Annual Meeting, we likely do not have your current e-mail address. Please send a message to peer-review@aam-us.org so we can update our records.

based museum you will evaluate is awaiting groundbreaking on a completely new building. It appears this has been the situation for 15 years. Seventy percent of the needed funds have been pledged and the museum is awaiting word from the university and state government as to whether the final thirty percent will be provided. Internal pressure for a new museum building is mounting and the project's supporters are becoming desperate.

I tell people that they should be frank and forthright with me and that my report will frame their concerns in a positive way.

SCENARIO 2 RESPONSES:

In this case I would (1) look at the museum itself as early in the visit as possible and then (2) armed with this knowledge, try my best to meet with as many of the decision makers involved in the funding issue as I could. On several MAP visits, it has been clear that decision makers (particularly at university museums) will listen to the outside consultant when they won't listen to their own staff. More than once I have left the office of a dean or a president with the local host saying "We have been trying to tell him that for years and he never listened to us!"

—John Simmons, Collections Manager, Natural History Museum, University of Kansas

Prior to his arrival, the Surveyor or committee chair might speak to the museum director to determine how well how well his the schedule of visits would enable him to assess where the place of the museum's needs fit with the university's long-

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PEER REVIEWER MANAGER'S CORNER

Recruiting • Supporting • Developing Peer Reviewers

The newly minted policy Site Visit Expectations, published in this issue of *NEWStandard*, presents guidelines for increasing the effectiveness of a site visit. It expands upon the Performance Expectations included in the Peer Reviewer Qualifications for Service policy, which appeared in the last issue. By using an iterative development process involving the Peer Reviewer Advisory Committee, the Accreditation Commission, the MAP Advisory Committee, and AAM staff, these and future documents will clarify what each stakeholder believes is critical to a successful program of peer review.

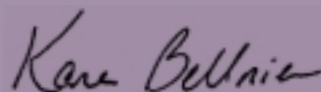
AAM is committed to providing peer reviewers opportunities to grow and learn, to develop skills through peer review. We have heard from you that this learning and leadership development is a primary benefit of participating. Therefore, we are developing a system of evaluation and feedback that will recognize exceptional efforts, provide peer reviewers with constructive feedback on their efforts, and identify areas where AAM needs to provide additional training and support.

Building on the criteria for successful peer review outlined in the policies mentioned above, we are now developing an integrated evaluation system. We are using the same mechanism by which we developed the policies, gathering feedback from a variety of perspectives: the audience (the museum and the Accreditation Commission), the AAM program staff, and the peer reviewers.

To ensure the clarity and effectiveness of the new evaluation process and tools, I encourage each of you to participate in the discussion. On the peer review section of the AAM Web site (www.aam-us.org/peer-review) you will find components of the evaluation, the methodology for gathering feedback, and an area for your responses. Evaluation is also the topic for the Peer Reviewer Forum to be held at the AAM Annual Meeting in Portland, Oreg., on Tuesday, May 20 at 4:45. If neither of these opportunities works for you, please contact me for alternatives.

In other peer review news, a new promotional campaign for peer review is underway. Its goals are to 1) raise awareness in the museum community about the benefits of peer review to museum professionals, the institutions at which they work, and the field at large and 2) increase the number of peer reviewers in anticipation of increased need. See page 5 of the January/February issue of *Museum News* for a preview of the new look and message. We need your help in identifying colleagues who would be positive additions to the peer reviewer team. Contact me with any suggestions.

I hope to see you in Portland at the Annual Meeting. See the enclosed invitation for opportunities especially for peer reviewers.



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REFERENCE DESK

This feature provides annotated references of articles, Web sites, books, and more that relate to the newsletter theme. You are encouraged to submit annotated references that you have found helpful.

The following electronic resources may help you hone the interviewing, listening, and facilitation skills that are essential to the site visit. All of the resources all come from outside the museum field; this is an instance of borrowing from the wisdom from outside the profession.

Questioning. This one-page tip sheet was compiled by the Staff Development Office at the University of Sussex. It notes that asking good questions takes practice. Good questions require more than one-word answers and are specific, concise, and easily understood. The tip sheet identifies four types of effective questions and four types of questions to avoid, with examples of each.

<http://www.cogs.susx.ac.uk/local/doc/teaching/teachingnode15.html>

Asking Good Questions. A number of theorists have organized intellectual activity into levels; one of the most well known of these structures was authored by Benjamin Bloom in 1956 and is known as *Bloom's Taxonomy*. The matrix was developed at the Appalachian State University as part of the College of Education's teacher preparation. The matrix identifies six levels of questioning and suggests words to use in seeking information at each level.

<http://www.ced.appstate.edu/~goodmanj/3850/webquest/questions.html>

Listening Skills. This Web site notes that "Listening is an art, a skill, a discipline, and like other skills, it needs self-control. . . . Hearing becomes listening only when you pay attention to what is said and follow it very closely." The Web site was developed by the Department of Veteran Affairs as part of its Alternate Dispute Resolution & Mediation Program. It gives tips on verbal and nonverbal ways to let the speaker know you are listening, to build rapport, and to put the speaker at ease.

<http://www.va.gov/adr/listen.html>

Listening & Empathy Responding. This Web site was developed by the Mental Health Net. While it begins with an identification of the common barriers to effective listening, the bulk of the site is focused on improving empathy responding skills. A listener's response can trigger a range of reactions—from derailing the conversation to uncovering new insights. The site offers four steps to improve empathy responding and includes a short bibliography.

<http://mhnet.org/psychhelp/chap13/chap13c.htm>

Group Facilitation. This Web site, developed by the University of Edinburgh, looks at the facilitator's role in ensuring that a group works as a constructive and cohesive unit—whether in brainstorming a new idea or discussing a particular issue. The site provides a detailed discussion of the facilitator's duties, the managerial and personal skills needed, and problems a facilitator may encounter.

<http://www.see.ed.ac.uk/~gerard/MENG/MECD/topics.html>

On the Ground

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range plans, to alter the itinerary if required, and to request any additional documents.

—Bradley Brooks, Director, Lilly House Operations & Programs, Indianapolis Museum of Art

SCENARIO 3:

PERSONAL AGENDAS

Sitting in on an all-staff meeting during your visit, there is tension in the room and people's responses are quite polite but clearly hiding meaning. As you leave, the curator pulls you aside and whispers to you that the director doesn't understand the needs of the staff and seems to be making decisions that threaten the stability of the museum. During an earlier board-only meeting, several board members had expressed frustrations that the museum didn't seem to be advancing quickly enough and the frustrations were targeted at the director.

SCENARIO 3 RESPONSES:

In this situation—it has happened, (although nothing quite so extreme),—I have asked for private meetings with as many people as possible during which I assure each person that I am interested in what they have to say and that their opinions will be treated with the utmost confidentiality. I tell people that they should be frank and forthright with me and that my report will frame their concerns in a positive way. They can be as negative as they like when talking to me; it's, that my job is to present their criticisms in a positive framework.

—John Simmons, Collections Manager, Natural History Museum, University of Kansas

As a peer reviewer, you must keep yourself in the mindset of the job you are supposed to do which, of course, is different for both pro-

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In Sight

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suggestions for improvement. The first visit was very positive, and the board and staff were much more at ease regarding subsequent peer review visits. In fact, we always looked forward to the site visits with much excitement and anticipation.

The NMCWM implemented at least 80 percent of the recommendations made by our MAP Surveyors. I cannot describe all the positive actions we took as a result of the suggestions from our MAP Surveyors, but I want to describe the positive actions that occurred as a result of our participation in the Governance Assessment.

The visit by the Surveyors and their final report had a profound impact on the museum's board of trustees.

We all felt very much at ease during the site visit which I think surprised us.

The board members who met with the Surveyors were extremely motivated to make positive changes for the benefit of the museum. Discussions immediately ensued regarding who would be the most effective individuals for the nominating committee; improved strategies for fund raising; succession planning for board officers; and who should be considered for the proposed national advisory board.

The way we prepared for the Accreditation Visiting Committee was, of course, much different from the way we prepared for the visits by our MAP peer reviewers. It was typical for the museum's staff and board members to prepare a list of questions to ask the MAP reviewers

during their site visit. For the Accreditation site visit, the executive director and I made sure the staff and board members were informed on the differences between the MAP and Accreditation programs concerning the way the site visit would be conducted.

We made copies of *A Closer Look—The Accreditation Visiting Committee Handbook* and distributed it to all members of the board and staff. We highlighted areas of key importance and emphasized that they were not to ask the Visiting Committee for recommendations as they had done during the MAP visits. We explained that Visiting Committee members were *prohibited* from giving advice, even if asked, and told them to familiarize themselves with *A Closer Look* before the Visiting Committee's arrival. By the time our Accreditation Visiting Committee arrived, the museum's staff and board members were well versed on the differences and knew what to expect from the Visiting Committee.

Like our MAP surveyors, the Accreditation Visiting Committee did an outstanding job of establishing rapport and making all staff and board members feel at ease. They asked pertinent questions and treated everyone with dignity and respect. In keeping with their role, however, they did not give any indication as to "how we were doing."

We all felt very much at ease during the site visit which I think surprised us. In retrospect, I strongly believe this is because we work so well as a team. We each have a clear understanding of the museum's strengths, goals, priorities, and mission. The site visit allowed us to demonstrate that to the Visiting Committee.

Since we were able to answer questions posed to us by the Visiting Committee with confidence, the site visit did, in fact, increase the institutional pride of both the staff and members of the board of trustees.

Of critical importance to the success of each of the visits were the director's efforts in educating the staff and board members as to the purpose of the visit and the roles of the Surveyors/Visiting Committee members. This ensured there was no confusion or misconceptions about what to expect from the Surveyors/Visiting Committee members and made for very smooth and productive site visits in all cases.

In summary, the director's ability to properly educate the staff and board members on the purpose of the site visit and the role of the peer reviewers is just as important to a successful site visit as the peer reviewers' ability to put this same group at ease by building rapport, asking good questions, and listening carefully. ■



On the Ground

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grams, MAP and Accreditation. Do your best to remain objective at all times and do not under any circumstances allow yourself to become “involved” in the personal struggles of the staff and board. Remind yourself over and over again of the information you need to acquire to answer the questions you need to answer. Rely on the list of questions that you’ve prepared before your visit to keep focused but ask additional probing questions that might illuminate what is actually going on in the museum.

— Debra Hughes, Curator of Collections & Exhibits, Hagley Museum & Library, Wilmington, Del

See **NEWStandard: Current Issue Supplement** on www.aam-us.org/peer-review for the responses to the following . . .

SCENARIO 4:

LEADERSHIP TRANSITION

After a long flight, you are met at the airport by the director of the museum you are about to visit. Following the introductions, the director announces, “I have just been fired from the museum, but I will take you there and lead you through your visit.”

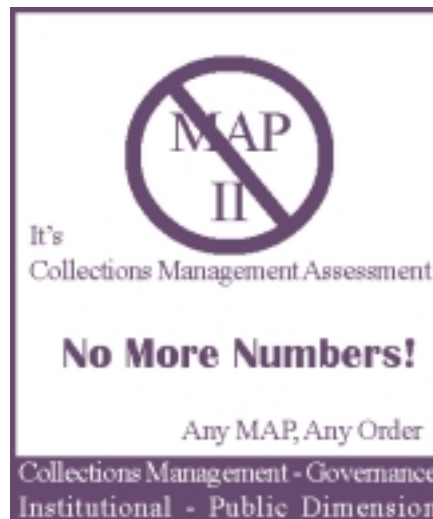
SCENARIO 5:

INTER-TEAM TEAM

DIFFERENCES

You are on a two-person site visit. The museum seems to be struggling with some basic and not insubstantial issues. In a meeting with the full

board and director, your team member stands up and says, “I just don’t know what you are all doing! I am just glad that I don’t have to work here.” ■



OPPORTUNITY KNOCKS!

Keep an eye on this space in every issue for deadlines, important dates, and exciting opportunities of interest and benefit to peer reviewers and museum professionals.

Evaluating Governance: A workshop for AAM peer reviewers

LAST PRESENTATION!! This workshop explores how to assess governance in a museum setting and identifies the characteristics of good governance. The workshop is free and lunch will be provided; participants must pay for their own travel and accommodations. Sign up by contacting Karen Bellnier or at www.aam-us.org/peer-review.

May 22, 2002 • Annual Meeting of American Association of Museums, Portland, Oreg.

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REMEMBER: Institutions sending six or more staff members receive discounts on registration fees!

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Accreditation Program application deadlines:

June 30, 2003

December 31, 2003