

## MAP Surveyor Quick Reference Guide

### Your Users Guide to the Peer Review Manual

This Guide complements your *Peer Review Manual*. It highlights the basics of each step of the visit process and references sections of the *Manual* that have the full details you will need to read. The relevant section and page(s) of the *Manual* are indicated in parentheses. In addition to your printed version, for your convenience the Manual is available on the AAM's web site: [www.aam-us.org/programs/peer\\_reviewer/manual](http://www.aam-us.org/programs/peer_reviewer/manual).

### Before the Visit: Preparation

#### 1. Review Your Roles and Responsibilities

If appropriate, go over the specific duties of the Team Contact and the Team Member **(C15-17)**, and review the Site Visit Expectations **(E10-11)**, and the MAP Surveyor Position Description **(E6-7)**.

#### 2. Review All Documentation (C18)

Prior to the visit, ensure you have a thorough understanding of the institution by reading the entire Self-Study and supporting documentation so you will be able to identify areas to focus on while on site, set an appropriate visit agenda, and identify any additional materials you need to ask for in advance.

#### 3. Set the Agenda (C21-22)

In collaboration with the museum, using the *Critical Issues Checklist (C3-C14)*, and referring to your own and, if applicable, your team member's notes and questions, develop an agenda that will provide you the time to:

- meet with key staff and the assessment team
- gain insight into daily operations
- answer any questions or concerns that emerge from review of the materials
- take notes and reflect
- visit any off-site facilities

#### 4. Travel Planning

Now that IMLS funding comes directly to AAM—rather than to the museum in the form of grants—peer reviewers are reimbursed for travel expenses directly from AAM. Since the MAP's goal is to serve as many museums as possible, it is important that travel costs be kept at a minimum. As you plan your travel, refer to the Tips on Keeping Travel Expenses Down (link) sheet.

### On Site: Conducting the Visit (C23-25)

#### 1. Interview with the Director

Interview the director at the beginning of the visit:

- set the tone of the visit by stating the purpose of your role
- confirm the confidential nature of the information gathered
- review the agenda

- ask questions and clarify aspects of the review and museum's operations
- gather and review any new information or documents

## 2. Interview with Staff and Governing Authority

Meet with key staff and members of the governing authority (individually and/or as a group depending on size and time). These interviews must be thorough and candid and should take place in private, without the director present, to provide an opportunity for open discussion.

## 4. Tour all Facilities

Visit all public and behind the scenes spaces; schedule time to visit off site storage facilities or branch/satellite sites. For a Public Dimension Assessment, also take time to tour local attractions.

## 5. Exit Interview

Always schedule an exit interview during which you ask for the director's observations about the process, verify that the factual information you gathered is accurate, and describe your general observations, citing any areas of significant concern that you plan to bring up in the report. For some site visits it may be appropriate to meet with the entire Assessment Team or a small group representing the Assessment Team. Use your best judgment.

## 6. Final Team Meeting (if appropriate)

If you are part of a 2-Surveyor site visit, take some time on-site before you depart to touch base and compare notes. This is an excellent opportunity to set the outline for the narrative report, deciding which team member is responsible for writing which portion of the report.

*Tip: Shortly after the end of the visit, keep your ideas fresh by writing down your initial thoughts in the form of an outline from which you can build the report.*

## **After the Visit: Writing the Narrative Report (C26-30)**

- Writing the report soon after the visit will allow you to draw on fresh memories and lead to a stronger, more detailed document. MAP staff have observed that as time elapses, other priorities begin to claim your attention, and the specifics of the visit begin to fade.
- See pages **C26-30** for format, writing style, and content guidelines/instructions.
- The report communicates your analysis of the museum's operations to the museum and its stakeholders—the primary audience for the report.
- Following a review by MAP staff, the report will be sent to the museum. A fair and balanced report based on specific observations and critical analysis will contribute to the institution's growth and development.
- Be completely candid and honest in your description and analysis, but diplomatic and collegial in the phrasing.
- Call the MAP staff if you need any help crafting the report (e.g., need guidance on the best way to approach a significant problem area).

## **Wrapping Up: Submitting the Report and Returning Materials (C29-31)**

Please submit your report on time. If you need additional time, contact the MAP staff as soon as possible to let them know. Lateness can result in the MAP process and your recommendations losing legitimacy with the museum and its stakeholders.

To complete your assignment, submit:

### 1. The Report

- Submissions via e-mail are preferred.
- Give the report a once-over to ensure there are no spelling/grammar errors or typos.

### 2. Self-Study Materials and Supporting Documentation

Destroy or return to the museum ALL the Self-Study materials (questionnaire and supplementary documentation) you received, plus any additional materials picked up on site.

### 3. Travel Reimbursement

If you are visiting a cooperative agreement participant and will be reimbursed from AAM, you can either request immediate reimbursement, turning in the rest of your expenses when the site visit is complete; or you can turn in all your expenses together for a single reimbursement when your visit is complete. Download the Peer Review Travel Expense Reimbursement Form ([link](#)).

Site visits are still occurring for museums that entered the program prior to the funding change, so those site visit expenses are reimbursed by the participating museum, as in the past.

### 4. Honorarium

After MAP staff have reviewed your report they will send you your honorarium. If you either choose not to accept, or are not able to accept, an honorarium, contact MAP staff. Your honorarium can either be sent to the museum you visited or your own institution.

### 5. Evaluation

Once MAP staff receive your report you will be sent an evaluation form for you to complete. This is your opportunity to describe your experience with the assessment process. Be honest and candid. MAP staff review these evaluations and use the information in order to improve the program. Download the Evaluation Form for Surveyors.

## **Additional Resources and Reference Materials**

You will find links to the following on the Help Desk for MAP Surveyors page on the peer review website (<http://www.aam-us.org/getinvolved/pr/Help-Desk-for-Visiting-Committee.cfm>)

- Surveyor Forms (Tips on Keeping Travel Expenses Down, Travel Expenses Form, and Evaluation Form for Surveyors)
- Site Visit Expectations
- Team Contact and Team Members Duties
- How Peer Reviewers are Evaluated
- Policy on Confidentiality: Peer Reviewer Responsibilities
- Resources and Tips on Interviewing, Listening, and Facilitating

- General Resources for Effective Peer Review (professional associations, publications, etc.)
- The AAM Information Center
- Back Issues of NEWStandard, the peer review newsletter
- Accreditation Standards (Accreditation Commission Expectations and the Characteristics of an Accreditable Museums)

THANK YOU FOR VOLUNTEERING TO BE PART OF THIS IMPORTANT PROCESS!  
WE APPRECIATE YOUR TIME AND HARD WORK.

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