



ACCREDITATION SELF-STUDY QUESTIONNAIRE

List of Attachments¹

- Documents listed as “required” must be submitted. Policies, plans, and legal/organizational documents must be formally approved by the governing authority and bear a date of approval.
- Documents listed as “if available” should be attached if the museum has them. They are not mandatory at this time.
- Several documents are marked with an asterisk (*). This means there is an Accreditation Commission Expectation or an AAM Guideline available on this topic.

Required

- Institutional code of ethics*
- Mission statement*
- Institutional plan*
- Articles of incorporation, charter, enabling legislation, or other founding document
- Bylaws, constitution, will, or other documentation under which the museum is governed
- IRS letter of notification regarding tax-exempt status
- If the museum has a parent organization:* Documentation regarding the importance of the museum to the parent, expressing its commitment to support the museum (e.g., resolution of permanence passed by parent, parent organization’s by-laws or organizing documents, memorandum of understanding, or management agreement between the parent and the museum)*
- Documentation of operational relationships with other organizations integrally connected to the museum’s governance or operations (e.g., written memorandum of understanding or other type of formal agreement)
- List of current members of the governing authority
- Evidence of delegation of authority for day-to-day operation of the museum to the museum director or the equivalent position*
- Table of contents of the governance manual (i.e., reference manual assembled for use by members of the governing authority to assist with orientation, training, and ongoing work)
- Organizational chart(s) (including parent organization, governing authority, partner organization, advisory board, supporting organizations, staff, and volunteers as applicable)
- List of principal professional and administrative staff positions (including the following for each: title, incumbent’s name, salary, and employment category)
- Position descriptions and current resumes for principal professional and administrative staff (both current and vacant positions)
- List summarizing staffing levels (numbers) by category (e.g., administrative, curatorial, education, security, physical plant, visitor services, etc.)
- Personnel policies manual
- Repository agreement for objects in custody without title (required for some museums)
- Visual images to illustrate the scope of the museum’s collections
- Collections management policy and loan policies (custodial care and borrowing policies for museums that do not own or manage collections, but borrow and use collections for exhibits, education, or research)*
- Sample copy of completed collections documentation record(s) (with accession, catalog, and inventory information)
- If the museum is authorized to deaccession, a copy of a deaccession form or other written documentation used for deaccessioning purposes (a completed form if applicable, otherwise a blank form)
- Sample copy of a completed outgoing loan agreement

- Sample copy of a completed incoming loan agreement
- Sample copy of completed condition report form
- List of titles and dates of the museum's exhibit offerings during the last three years (long-term, temporary, traveling exhibits)
- Images of exhibits to illustrate various exhibition design techniques used (in galleries, other interiors, interpreted landscapes, other exterior settings)
- Images that illustrate the museum's live interpretive activities in action (e.g., programs, outreach, demonstrations, tours, interpreters, classes, etc.)
- List of museum publications and non-print media projects (print, audio, electronic) produced in the past three years (list name, format, and date)
- If the museum does original research:* List of staff research results published in publications (e.g., books, popular or scholarly journals) other than the museum's in the last three years
- Most recent museum program/exhibit/events calendar
- Samples of: promotional materials (e.g. program announcements, exhibit brochures, etc.) that illustrate the scope of the museum's interpretive offerings; materials that illustrate the range of programs for students and teachers; museum publications and/or non-print media materials (Four maximum for each category)
- Current year operating budget and non-operating expenditures
- Audited financial statements for two years plus management letters (if most recent year is not yet available, submit unaudited year-end financial report)
- Floor plan and/or site map
- Emergency/disaster preparedness plan (covering staff, visitors, and collections)
- Images of the museum's public and non-public areas, both indoors and outside (e.g.: grounds, exteriors, galleries/exhibit spaces, classrooms/studios/programming spaces, sales areas, food service areas, collections processing/storage, mechanical areas, laboratories, offices, workshops, loading dock/receiving area, etc.)

If Available

- Samples of tools the museum uses to assess whether it has achieved its goals (e.g., visitor satisfaction surveys, exhibition evaluations, program evaluations, focus group questions/reports, community surveys, financial/other performance indicators, etc.)
- Vision/value statement(s)
- Documentation regarding any internal, non-governing groups that serve in an advisory capacity (e.g., resolution of the board establishing this group, statement of purpose, operating guidelines, etc.)
- Table of contents of volunteer manual
- Collections plan
- Conservation plan
- Interpretive plan or education master plan
- Furnishing plan
- Investment policy
- Annual reports produced within the last three years
- Printed descriptive materials pertaining to any membership/donor programs (should include dues and benefits structure for each program)
- Individual donor support policy*
- Business support policy*
- Completed RC-AAM *Standard Facility Report*

¹A complete Accreditation Self-Study consists of a detailed questionnaire plus the attachments. A copy of the questionnaire is available to Accreditation Program participants by calling 202-289-9116 or e-mailing accreditation@aam-us.org. The questionnaire is available to everyone else by purchasing the Accreditation Resource Kit from the AAM Bookstore.