



What You Need to Know About: Getting Ready for the Accreditation Site Visit and Next Steps

While the Accreditation Program staff works on establishing the Visiting Committee for your museum's Accreditation site visit—based on the list of names approved by the museum on the Potential Peer Reviewer Selection Form—here are some key things to keep in mind and to start working on. The following information will help you prepare for the site visit and inform you about what happens next in the process.

About the Visiting Committee Formation and Scheduling Process

When the Visiting Committee Team Contact* is secured, the Accreditation Program staff will let you know. Meanwhile, the Team Contact will work to find a second team member and will contact you directly to arrange the visit date, discuss logistics, and develop the visit agenda.

About the Timing of the Visiting Committee Phase of the Accreditation Review Process

While every effort is made by the Accreditation Program staff to expedite this process, we ask for your patience and want you to have realistic expectations. You should know that the process of securing a Visiting Committee team and setting a date can take up to 6 to 12 months—due to peer reviewer availability and responsiveness, and a generally high program workload—and the visit date is usually scheduled several months after that point. A basic review timeline is available at www.aam-us.org/museumresources/accred/process.cfm.

For More Detailed Information About Site Visit Issues

See *Frequently Asked Questions about the Accreditation Site Visit* at www.aam-us.org/museumresources/accred/SiteVisit.cfm. It addresses issues such as scheduling, logistics, expenses, roles and responsibilities, what happens after the site visit, and dealing with unexpected circumstances.

How & When You Will Next Hear from the Accreditation Program Staff

- You will receive a notice via e-mail when we confirm the Team Contact of your museum's Visiting Committee.
 - You will receive a date confirmation notice via e-mail when the Team Contact informs Program staff of the visit date.
 - You will receive an e-mail notice, and a packet of information and materials in the mail, when we ship the museum's Self-Study to the Visiting Committee. This usually happens approximately two months in advance of the visit. Your packet will include important visit information such as:
 - what materials each party received
 - confirmation of the visit date
 - the due date for the Visiting Committee's report
 - when the museum is expected to be reviewed by the Accreditation Commission
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- Approximately 2-4 weeks after the visit, you will get a Peer Reviewer evaluation form via e-mail. You are asked to evaluate the reviewers' performance related to the site visit.
- Approximately one month before your museum is slated to be reviewed by the Accreditation Commission, you will receive a letter from the program staff that indicates:
 - we have received the Visiting Committee's narrative report
 - the date of the meeting when the museum will be reviewed
 - when and how you can expect to receive the Commission's decision
 - the museum's address and the names of the director and head of the governing authority that we have on file (in case they need to be updated). We want to make sure your decision letter gets to the right place and the right people.
- Approximately a month after receiving your final decision from the Accreditation Commission, you will get an overall program evaluation form via e-mail. As part of this, you are asked to evaluate the Visiting Committee report.

How to Prepare for the Site Visit

Here are some basic guidelines to help staff, volunteers, and members of the governing authority prepare for the site visit. It is a general framework and directs you to other print and on-line resources that contain more detailed information.

The most common sources of frustration and dissatisfaction reported by museums and peer reviewers are: conflicting expectations, hesitation about openly addressing underlying issues or concerns, and lack of involvement of key staff or members of the governing authority.

The purpose of the visit is:

- to confirm for the Accreditation Commission that the museum operates as reported in its Self-Study, meets the program requirements (eligibility criteria, Characteristics of an Accreditable Museum), fulfils its mission, and operates according to standards and best practices
- to provide an outside, peer perspective on the museum's strengths and weaknesses

The role of the Visiting Committee is:

- to observe, assess, verify, and analyze—be the Commission's "eyes and ears"
- to provide the Accreditation Commission with information that can aide in its decision-making process
- **not** to provide specific recommendations to the museum on how to improve operations or rectify problems (in person or in the report)

1. Get Everyone Informed and Involved

Read the resources listed below and thoroughly orient the governing authority, staff, and volunteers about what to expect from, and during, the site visit—including the roles and responsibilities of the Visiting Committee and the museum, what will happen, and what the museum will be evaluated against. Include staff of all levels and in all areas of the museum.

General overview of the site visit phase

- "Site Review" chapter in your copy of *A Higher Standard: The Museum Accreditation Handbook*, pages 34-43 for a (includes tips for a successful site review).
- *Steps in the Accreditation Process*: www.aam-us.org/museumresources/accred/process.cfm

What will happen—in detail

- *Peer Review Manual*, pages D23-39 instructs the Visiting Committee in each step in the visit process—before, during, and after—in detail. It also outlines performance expectations which the Visiting Committee is evaluated against. The *Peer Review Manual* is the reference manual for all peer reviewers; it is important for you to review key sections so you know what the reviewers are expected and instructed to do.
The entire manual is on-line at www.aam-us.org/getinvolved/pr/pr_main.cfm.

What the museum will be evaluated against

- *The Characteristics of An Accreditable Museum, the Two Core Questions, and the Accreditation Commission's Expectation*. These are the standards for accreditation. Download all of them from: www.aam-us.org/museumresources/accred/standards.cfm.
- Visiting Committee's "A Guide to the Characteristics of an Accreditable Museum" in the *Peer Review Manual*, pages D5-9.

Roles and Responsibilities—The Museum's and the Visiting Committee's

- *Site Visit Expectations*: www.aam-us.org/getinvolved/pr/upload/E10_Site_Visit_Expectations.pdf
- *Peer Review Manual*, pages D23-39 ("Preparing for the Visit" through "Fulfilling Your Responsibilities")

2. Set the agenda

Once your Visiting Committee team has been established, work with the Visiting Committee Team Contact to draft an agenda. Share a copy of the final agenda with everyone at the museum.

The museum and the Visiting Committee team must develop a mutually agreed upon agenda that allows for:

- Initial interview with the director
- A tour of the entire facility (including galleries and other public spaces; program departments, offices, work areas; collections areas, including storage and records; workshops, meeting rooms, and laboratories; grounds; off-site collections storage areas; and satellite sites)
- Meetings with individual key staff members
- A meeting with some or all of the governing authority members
- Meeting with all staff in one or more groups (if the staff is very large)
- Time for team members to talk with each other and discuss findings
- Follow-up interviews as necessary
- An exit interview with the director
- Final touch base meeting between the Visiting Committee team members

For more information on the agenda, see "Setting the Agenda" on page D28 of the *Peer Review Manual*, and pages 38-39 of *A Higher Standard: The Museum Accreditation Handbook*.

3. Go back over all your accreditation review related documentation

This includes your:

- Self-Study Questionnaire
- Self-Study Required Attachments (update as needed—see section below on Briefing Book)
- Self-Study Checklist (and any supplemental information or clarification submitted in response to it)—specifically note any items cited for Visiting Committee follow-up and be prepared to respond
- Interim Approval Letter (if this is your museum's first accreditation review)—specifically note any items cited for Visiting Committee follow-up and be prepared to respond
- Previous Visiting Committee Narrative Report/Decision letter (if this is a subsequent review)

This is also the complement of documentation the Visiting Committee is instructed to review in preparation for the visit—see “Reviewing the Documentation,” page D27, in the *Peer Review Manual*.

Staff and governing authority members should be well-versed in the details of the Self-Study, the museum’s mission and strategic plans, and be prepared to answer questions and make information available to the team.

4. Prepare a Briefing Book

It is generally advisable for the museum to prepare a “briefing book” for the Visiting Committee to supplement and update the museum’s original Self-Study materials (especially if it has been over a year since the materials were first submitted).

This updated information should be made available to the Visiting Committee as the team prepares for the visit. You should communicate with the Team Contact about when to send the updated materials and ask if there is anything else the team wants. A list of the items in the briefing books should also be forwarded to program staff.

The briefing book that is provided to the Visiting Committee will be returned to the Accreditation Program staff by the team, and will be reviewed by the Commission as part of the museum’s official accreditation material.

The briefing book might include the following, as necessary:

- Updated staffing and budget information, such as:
 - an updated organizational chart
 - a staff list (with salaries)
 - staff résumés (for newly hired professional staff)
 - current year operating budget or financial reports
- Any planning and policy documents, that have revised or newly drafted, such as:
 - a mission statement
 - institutional/strategic plans
 - emergency preparedness plan
 - collections management policy
 - institutional code of ethics
- Updated printed matter, such as:
 - program calendars and/or newsletters
 - membership brochures
 - list of current and planned exhibitions
 - list of publications produced in the past two years
- Also include any other supporting materials or updates to the Self-Study Questionnaire answers that you would like the Visiting Committee and Accreditation Commission to see.

If you have any other questions, do not hesitate to contact the Accreditation Program staff at

Phone: 202-289-9116 Fax: 202-289-6578 accreditation@aam-us.org

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