

MAP

Governance Assessment Self-Study Workbook

MAP Governance Assessment

Self-Study Workbook

American Association of Museums

The Museum Assessment Program (MAP) is an assessment tool that can help your museum attain excellence in operations and planning through a confidential process of self-study and peer review. MAP is one component of the Department of Museum Advancement & Excellence at the American Association of Museums. The department also includes the Accreditation Program, Information Center, and Peer Review.

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Confidentiality Statement

MAP is a confidential process—the resulting information is shared only with your institution, the MAP staff, and your Surveyor's). A museum's current executive director or head of the governing authority can request copies of documents related to current or past assessments by contacting MAP staff.

The American Association of Museums' Museum Assessment Program is supported through a cooperative agreement with the Institute of Museum and Library Services.

The American Association of Museums has been dedicated to promoting excellence within the museum community for over 100 years. AAM's mission is to enhance the value of museums to their communities through leadership, advocacy and service. AAM is the only organization representing the nation's entire museum community. Since its founding in 1906, AAM has grown to nearly 20,000 members, including more than 13,800 individual members, 3,000 corporate members, and more than 3,100 museums. For more about AAM, please visit www.aam-us.org.

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ACKNOWLEDGEMENTS

The American Association of Museums extends its thanks to the following institutions and individuals for their assistance in the development of Governance Assessment:

The AAM Governance Taskforce

Edward Schneider (Chair), Executive Director, Santa Barbara Botanic Gardens
Lisa Tremper Barnes, Director, Philip and Muriel Bergman Museum of Art
Lucinda Barnes, Vice President, Museum Management Consultants
John Blades, Director, Henry Morrison Flagler Museums
Holly Block, Executive Director, Art in General
John S. Carter, President & CEO, Independence Seaport Museum
Karen Coody Cooper, Workshops Program Manager, Center for Museum Studies, Smithsonian Institution
Charles Dambach, President & CEO, Museum Trustee Association
I. Michael Danoff, Director, Art Programs, Neuberger and Berman
Bruce Eldredge, Director, The Hubbard Museum of the American West
Sylvia Evans, CEO, Wilton House
Richard Farwell, Executive Director, Vizcaya Museum and Gardens
Owen Glendening, President & CEO, Minnestrista Cultural Center
Jane Jerry, President, Cheekwood Botanical Garden
Lee Karpiscak, Interim Director, University of Arizona Museum of Art
Emily Kass, Director, Tampa Museum of Art
Janice Klein, Director, Mitchell Museum of the American Indian
John Patrick Kociolek, Executive Director, California Academy of Natural Sciences
Persijs Kolberg, Director, San Bernardino County Museums
Liselle LaFrance, Director, Historic Cherry Hill
Peggy Loar, Executive Director, American Center for Wine, Food and the Arts
Douglas Miller, Director, Pennsbury Manor
Richard Rogers, Trustee, Santa Barbara Botanic Garden
Betsy Rosenblatt, BoardSource
Mary Sellers, Director, Science Center of Iowa
Vicki Sopher, Curator, Red Cross Museum
Rowena Stewart, Director, American Jazz Museum

Staff and Governing Authority Members of the Governance Pilot Sites

African Art Museum of Maryland, Columbia, Md.
Brazoria County Historical Museum, Angleton, Tex.
Framingham Historical Society, Framingham, Mass.
Green Bay Botanical Garden, Green Bay, Wis.
National Museum of Civil War Medicine, Frederick, Md.
Scurry County Museum, Snyder, Tex.
University of Iowa Museum of Natural History, Iowa City, Iowa
Westmoreland Museum of American Art, Greensburg, Pa.

Our partners in the development of the Governance Assessment

The Museum Trustee Association
BoardSource (formerly the National Center for Nonprofit Boards)

And the Institute of Museum and Library Services for continued funding and support of the Museum Assessment Program and the development of the Governance Assessment.

As the *Workbook* represents a group effort, neither its components nor its entirety should be assumed to reflect the opinions or professional judgment of any one person listed above.

Jeffrey Buchheit
Assistant Director
Museum Assessment Program

OVERVIEW OF THE ASSESSMENT PROCESS

The Governance Assessment is designed to provide an overview of your museum's governance practices. Comprised of three phases—self-study, peer review, and implementation—the assessment is a collegial collaboration. Members of the governing authority, the director, other groups and individuals who influence governance, and museum staff share ideas and information in order to identify your governance priorities and address your needs.

Standards, Best Practices, and the Uniqueness of Every Institution

The Governance Assessment is designed to apply to museums of all disciplines, sizes, and governance types. This *Workbook*, for example, is applicable to a private nonprofit where governance is the sole purview of a Board of Trustees. It is equally applicable to a city museum whose operations are delegated to a separately incorporated nonprofit and has, in addition, an advisory board appointed by the city council. This inclusiveness is challenging because of the great diversity of governing structures:¹

- Roughly 73 percent of museums in the United States are private nonprofits. 22 percent are government organizations (e.g., municipal, county, state, federal, tribal) and 35 percent have a parent organization—of these parents, 27 percent are government organizations, 34 percent are colleges or universities, 20 percent are museums or museum systems, and 19 percent are other non-governmental organizations (religious organizations, foundations, etc.)
- Many museums create auxiliary groups that enhance the museum's organizational capacity. 17 percent of museums overall report having a separately incorporated friends, foundation, or other auxiliary group whose sole purpose is to raise funds or provide services for the museum. Over 40 percent of government-governed museums, one-fifth of college or university museums, and 10 percent of private nonprofit museums report having such groups. These groups can exert significant influence on the governing authority's stewardship responsibilities.
- Over 15 percent of museums undertaking the MAP Assessment process over the past two years have no full-time paid staff. Some have no paid staff at all. In such organizations, the governing authority often steps beyond its traditional governance role and engages in the full range of management activities required to run the museum.

This illustrates how hard it is to identify a “typical” governance structure for museums. The questions and activities in the *Workbook* reflect standards and practices as they are generally understood in the museum field. MAP used a wide range of sources to develop the *Workbook*, including the Accreditation Program, published references, research, and practices of other MAP participants. Because of the diversity of museums, however, the *Workbook* questions and activities are designed in a broad and flexible way. Interpret this document in light of your own needs, resources, and stage of growth. You may need to adapt some questions and activities in light of the structure of your museum's governance. Change the wording of questions as needed to make it more pertinent to your museum's operations and structure. If necessary, answer “Not Applicable,” but please indicate why. Though all questions and checklist components may not apply to your institution, they can serve as a guide to the variety of practices found in museums, practices you might consider implementing as you review your policies and procedures. Viewed in this way, they are tools to be used in your planning process.

¹Data from *1999 AAM Museum Financial Information Survey* unless otherwise noted.

Who Should be Involved in Governance Assessment?

- **The Governing Authority of Your Institution.** The governing authority of your institution bears the legal responsibility for stewardship of the museum. We encourage you to involve as many members as possible in the Governance Assessment through:
 - Participating in the completion of this *Workbook*, at least in selected discussions or Activities
 - Reviewing the completed *Workbook*
 - Meeting with the MAP Surveyor during the site visit
 - Engaging in planning and implementation after you have reviewed the Assessment results
- **The Director.** The director (e.g., executive director, CEO, chief administrator) of your organization is the person to whom the governing authority has delegated responsibility for the administration of the institution. It is rare for the director to be a voting member of the governing authority.² However, whether or not the director is a member of the governing authority per se, he or she plays a vital role in museum governance. The relationship between the director and governing authority, the concordance of their vision for the institution, and their ability to fill distinct and complementary roles are all key to organizational success. This assessment is designed with the assumption that the director and governing authority will be full and equal partners in its completion and that the director will serve on the Assessment Team.
- **Staff.**³ The governing authority depends on the museum staff to implement the policies and plans developed and approved by the governing authority. Staff often provide information the governing authority needs to make effective decisions on behalf of the museum. In addition, staff are key stakeholders of the museum. Their understanding of and belief in the governing authority are significant factors in your museum's ability to succeed. For these reasons, we encourage you to involve key staff members at appropriate stages in the Governance Assessment.
- **Supporting Groups and Individuals.** Section One leads program participants through an examination of the groups and individuals who significantly influence governance at the institution. You may determine that for your institution there is only one such group, the governing authority itself. In that case, fill in the Governance Roles and Responsibilities Worksheet for the governing authority, and go on to Section Two. Other institutions may find themselves listing half a dozen or more groups and individuals who significantly influence their capacity to govern. These museums will spend considerable time discussing and clarifying how governance roles and responsibilities are shared among these groups. We recommend that you solicit the involvement of all groups and individuals identified through your completion of Section One in some phase of the Self-Study. You may want to include them through participation in:
 - The Assessment Team
 - Filling out the Governance Review Workbook in Section Two
 - Discussion of the Strategic Questions in Section Three
 - Completion of the Self-Study Activities in Section Four

²In 1997 the National Center for Nonprofit Boards published a governance study showing that only 8 percent of chief executives of nonprofits are voting members of their own boards. This practice is often associated with a founder, or is instituted to reflect a more corporate model of governance (giving acknowledgment of status to the director comparable to that given to individual board

members within the organization). Whether or not they have voting privileges, directors typically are ex officio members of the board (meaning a member by virtue of the position).

³Throughout this document, staff refers to paid and unpaid, full and part-time positions, unless otherwise noted.

Their involvement should be commensurate with their influence on your institution's governance and their potential to enhance your governance capacity.

In addition, you will collaborate with:

- **The Peer Reviewer.** Called a MAP Surveyor, he or she conducts a site visit and in collaboration with you writes an Assessment Report. The Surveyor provides an objective perspective and expertise relevant to your needs. The Surveyor helps you to explore your organization from a fresh point of view, examines your operation in light of current standards and best practices, and shares models and resources for recommended changes.
- **The MAP Staff.** We help match you with a Surveyor and work with the Surveyor to provide resources and knowledge of current standards and best practices relevant to your concerns. We are your partners in the assessment process: please contact us if you have questions or want further information about how to get the most out of your assessment.

Maximizing the Benefit of Self-Study: Form an Assessment Team

Broad-based participation can foster an atmosphere of dialogue, planning, and cooperative decision-making that continues after the self-study phase is completed. To most effectively accomplish this, we recommend that you form an Assessment Team. The Assessment Team is responsible for:

- Overseeing completion of the Assessment;
- Establishing and monitoring a timeline for completion of the *Self-Study Workbook*;
- Scheduling the MAP Surveyor site visit;
- Evaluating the Surveyor's performance;
- Ensuring that the museum begins the process of planning and implementation after completing the Governance MAP.

At a minimum, the Assessment Team should consist of:

- A key member of the governing authority. In a nonprofit museum, this might be the current or incoming head of the governing authority (e.g., board chair). In a university museum, the key person might be the dean or other administrative officer with fiduciary responsibility for the museum. In a city, county, or tribal museum, it might be a supervisory official or an elected official.
- The director of the museum

In addition, the Assessment Team may include:

- Museum staff who work with the governing authority on issues such as finance or collections.
- Additional members of the governing authority. It would be particularly appropriate to include committee chairs.
- Members of groups and individuals exercising significant influence on the governance of your museum
(as identified in Section One)

Consider who should be the team leader. It may be the head of the governing authority, the director, or another member of the Assessment Team with skills to lead a team. The team leader should have the authority to communicate that the assessment is a priority to his/her co-workers.

If you have not already formed your Assessment Team, take time to do so now.

How to Involve the Entire Institution in the Assessment

Long-lasting results from the assessment are achieved when commitment is sought from the entire institution. You will want to prepare your institution for the assessment and apprise them of progress periodically.

We suggest:

- As you begin the Assessment, **orient the governing authority and key staff on the assessment process.** Introduce members of the Assessment Team, explain how each phase of the assessment is conducted, how the results will be implemented, and what benefits you expect from the assessment. We suggest you distribute the Glossary of Governance Assessment Terms as part of the orientation. The Glossary presents definitions for many terms specific to museums that may not be familiar to governing authority members. It also defines governance terms, to lay the basis for clear communication and productive discussions on governance issues.
- As the Assessment Team works through the MAP process, **involve additional members of the governing authority and key staff at appropriate points.** Invite their answers to the Review Exercise for Governance and participation in the Strategic Question discussions and Self-Study Activities. Provide information about the site visit: the Surveyor's name and experience, the visit date, and the schedule for meeting with the staff and governing authority.
- Upon receipt of the Assessment Report, **share and discuss the report findings** with the governing authority, groups and individuals who significantly influence governance at your institution, and key staff. You may want to distribute copies of the report itself or circulate a summary of the major points. Explain how your museum plans to use the results.

GOVERNANCE ASSESSMENT: SELF-STUDY PHASE

The Purpose of Self-Study

Guided by this *Self-Study Workbook*, which includes a questionnaire and activities, you are about to begin the initial phase of the assessment. Self-study enables the governing authority and staff to step back from the day-to-day work of the museum and take an in-depth view of their roles, responsibilities, and performance with respect to the institution's mission, goals, programs, use of resources, and operations.

The *Workbook* is designed to help you see the institution systemically, not merely as a way to prepare the peer reviewer. Most organizations find that they derive at least half the benefit of their assessment from the self-study process. Your responses to the *Workbook* build a profile of your institution's governance and help you evaluate its current strengths and weaknesses. The completed *Workbook* is an important institutional record and a valuable planning document. It serves as a baseline against which to measure progress as you improve management and operations of your governing structure. The purpose of the self-study is also to inform your surveyor prior to his/her visit. Please do not write to impress--write with candor to help guide and inform the surveyor and you will get more out of the experience.

Time Frame for Self-Study

In the Welcome Packet you received with this *Workbook* is a *MAP Assessment Timeline*. Consult the *Timeline* to find the due date for your completed self-study. This time frame accommodates the needs of different institutions. Some museums will need all the time allocated in the *Timeline*; others will finish sooner. If you find that the timeline does not fit your needs, contact the MAP staff to discuss revising it for your organization.

How to Use the Governance Assessment Self-Study Workbook

You will notice several features about the *Workbook* design. It is three-hole punched so it can be stored in a binder and pages can be removed easily for photocopying and distributing to members of the Assessment Team. When you place the *Workbook* in a binder, you may find it helpful to use tabs to mark the different parts and sections.

The *Workbook* is divided into three parts. Part I contains all procedural information, including steps in the assessment process. Part II is the heart of the Governance Assessment. You will complete a series of exercises where you explore governance issues and summarize your findings. Part II also contains the Self-Study Conclusion and Self-Study Evaluation. Part III is comprised of a glossary and list of resources.

Part II is divided into five sections. Each section begins with a cover page explaining its purpose, previewing the content, specifying who should be involved in completing the section, and outlining instructions for completion. For some sections the cover page also includes a list of additional resources or notes on how to adapt the section to the governance structure of your institution. After your Assessment Team determines who will be involved in completing each section, copy and distribute that section to participants.

Part III contains information that may be helpful in completing the Assessment. Museums often use different terminology to describe procedures, programs, and conditions. To help you decide how to respond to specific sections or questions, there is a Glossary of Governance Assessment Terms toward the end of the Self-Study Workbook. We suggest you distribute the Glossary as part of the orientation for the governing authority and Assessment Team. It can form the basis for clear communication and productive discussions on governance issues. The literature on nonprofit governance is a rich and deep resource. We have included quotes from various sources at key points in the Workbook to set the stage for discussion, provide context, and expose participants to a broader dialogue on the topic. Many of these works are listed in Resources, and we encourage participants to read further during both the self-study and implementation phases.

Using the Print and Electronic Versions of the *Workbook*

Use this printed copy of the *Workbook* to make notes, plan answers, and fill in worksheets. The following parts of the *Workbook* are available in the accompanying CD in several PC-compatible versions for your convenience. We recommend you complete them electronically:

- Institutional Information Form
- Governance Roles and Responsibilities List, Groups
- Governance Roles and Responsibilities List, Individuals
- Summary Form for Strategic Questions
- Summary Form for Activities
- Governance Snapshot
- Self-Study Conclusion

In order to make these copies readable by as many programs as possible, the formatting is very simple. Feel free to change font type and size, page breaks, etc. to make the document more attractive and legible.

You can answer multiple choice questions by using your word processor to overtype the appropriate box with an “x.” Or, after completing the narrative answers, you can print out worksheets and fill in the check boxes by hand.

Many museums find that their narrative answers exceed the space provided in the printed workbook. We do not intend for the spaces to limit the length of your answer. Using a word processor to complete the electronic copy will allow you to make your answers as long as necessary.

Sequence of Completion

Complete the sections in Part II in the following sequence:

- Section One: Identifying Who Influences Governance at Your Institution. This sets the stage for deciding who should be involved in the rest of the self-study.
- Section Two: Review Exercise for Governance. This will help you select which Activities in Section Four you will complete.
- Section Three: Strategic Questions and Section Four: Activities can be done simultaneously or in either order. You will probably find yourself discussing the Strategic Questions and completing the Activities throughout the remaining self-study period.
- Section Five: Governance Snapshot can be completed at any time
- Conclusion: The final step of the self-study phase is to answer the Conclusion questions. This provides the opportunity to refocus on your governance as a whole. It helps prioritize your needs and will prepare you for the site visit and the implementation phase.

Confidentiality and Candor

The completed self-study materials are **confidential** and, outside of your organization, seen only by your Surveyor and the MAP staff. To make the assessment as effective as possible:

- Answer the questions with total candor and in the manner most useful and relevant to your museum
- Encourage participants to think reflectively as they consider what it is they do, why and how they do it, and how well it works

Suggestions for the Assessment Team

- Agree on the assignment of responsibilities, including the distribution of sections in Part II
- Decide who will be involved in completing which Strategic Questions and Activities
- Set a timetable with interim deadlines to gauge progress and to apprise the governing authority and staff
- Collect the completed summaries of each section in Part II and compile them into one document
- Review the compiled self-study document for completeness and consistency; revise as necessary
- Answer the Self-Study Conclusion questions
- Secure signatures and submit materials to the MAP Office
- Collect additional documentation and send to the Surveyor

Submitting the Completed Self-Study Materials

Use this checklist to help with assembling your Completed Self-Study Materials. The completed materials consist of (assembled in the following order):

- Signed Institutional Information page
- Completed Worksheets from Section One
- Summary of Review Exercise for Governance in Section Two
- Summaries of discussions for Strategic Questions in Section Three
- Activity summaries from Section Four (at least four activities)
- Completed Governance Snapshot questions from Section Five
- Self-Study Conclusion
- Self-Study Evaluation
- Additional Documentation

Please note: You should not send your additional documentation to the MAP office. Send those materials separately to your Surveyor prior to the visit. Keep a copy of the Completed Self-Study Materials for your files and send **two copies** to:

**Museum Assessment Program
American Association of Museums
1575 Eye Street, N.W., Suite 400
Washington, D.C. 20005**

If possible, please also submit an electronic copy of your self-study materials either by e-mailing them as an attachment to map@aam-us.org or sending a disk with your hard copies.

If you have any questions or concerns regarding the use of this document, how to answer certain questions, or how to form an Assessment Team, contact the MAP staff at 202/289-9118, or via e-mail at map@aam-us.org.

NEXT STEPS

Select a Surveyor

MAP staff will select a list of potential Surveyors appropriate for your assessment based on their expertise and interests as well as your institution's size, type, and goals stated in your application. You will eliminate any potential Surveyors from consideration that may have a conflict of interest and rate the remaining number according to your preference. Immediately return the form to the MAP office. Staff will contact the Surveyors in order of your preference to determine their availability. *Please note that it is not appropriate to contact the individuals listed on the form to discuss their availability or willingness to conduct your site visit.* Once the preferred Surveyor confirms his/her availability and your museum submits its completed *Self-Study Workbook* including Activity Summaries, MAP staff will provide you and the Surveyor with contact information. It is your responsibility to contact the Surveyor within a few weeks, determine a site visit date, and notify the MAP office.

Preparing for the Site Visit

The site visit is a unique professional opportunity for both the museum and the Surveyor. It marks the culmination of much preparation and may be accompanied by high expectations and anxiety.

Once you notify the MAP office of the site visit date, collaborate with the Surveyor to develop the site visit agenda and determine travel arrangements. You and the Surveyor will receive the "Site Visit Expectations" document and sample site visit agenda to assist you with this process. The museum and Surveyor should agree to all travel arrangements in advance to ensure that the plans are reasonable, appropriate and acceptable to both parties.

Note that the site visit is a professional business trip that typically includes transportation (airfare and/or car rental), hotel accommodations and meals.

Other key preparations for the site visit include:

- Assembling the Additional Documents and send them to your Surveyor;
- Reviewing the site visit purpose, goals and agenda with your staff, governing authority and additional stakeholders. Clear expectations and an understanding of the Surveyor's role—to evaluate, not inspect—can quell apprehension surrounding the site visit.

Implementation

After completion of the self-study and peer review phases, you will have a self-study document—answers to the Questionnaire, Activity summaries, and Conclusion—and the Assessment Report. This is the time to review these materials with the purpose of addressing key issues in your planning. We suggest that you again use a team to undertake this process. It might be the same as your Assessment Team, or you might change the team composition to include people with different skills and knowledge needed to accomplish this phase. If you form a new team, have the Assessment Team fully brief members on the assessment process to date, its results, and their recommendations for further action. We further suggest you integrate assessment results into your planning for the next one to three years.

Leveraging Your Assessment

Many museums have used their Assessment Reports and the recommendations contained therein to approach funding agencies and donors with requests for support to implement the recommendations. In other cases museums have used their new knowledge gained from the assessment and implementation process to bolster their requests to funding agencies and donors. Funding agencies and donors are often impressed with the amount of work that the museum has done throughout the process, making your museum all the more competitive.

Evaluation and Implementation Goals Form

Once you have received your Assessment Report and have had some time to share it with your stakeholders, MAP will send you an Evaluation and Implementation Goals Form. We will ask you about your experience with the assessment process and what recommendations and changes you expect to implement during the following year. For applicants participating through the annual deadline, the MAP office will send you a resource packet from the AAM Bookstore once we receive your completed form.