

## Accreditation Visiting Committee Report Writing Guide

Use the following as an outline for writing your Visiting Committee report. This guide is based on the Characteristics of an Accreditable Museum, (a copy of which is located in the front matter of the Self-Study attachment binders and also on the AAM website at <http://www.aam-us.org/museumresources/accred/standards.cfm>) and will ensure that all reports contain the same necessary content and are organized in a consistent manner. Use the questions as a guide on what you should look for while on site, but remember that the report should be narrative and should not simply answer the questions outlined below. Please keep in mind that the Accreditation Commission relies on you to be their eyes and ears and to fully describe the institution. Be sure to give analysis based on your experience and expertise and feel free to personalize the report with your unique style and voice.

Most reports average 15 pages in length.

### Organizing & Writing the Report:

- Read through the Self-Study Review Checklist (found in the front matter of the attachment binder(s)) carefully to determine what areas the team needs to give special attention to.
- Be sure your language and descriptions are sufficient to give someone who did not participate in the site visit a clear picture of the institution.
- Provide a comprehensive and accurate picture of the museum's unique operations with thorough analysis that meets the program and institution's needs.
- Make sure your language is clear and that your ideas are easy to identify and understand.
- Write to the Accreditation Commission as your main audience and not to the museum and do not include consultative language (e.g. provide prescriptive advice on what the museum should and should not do).

### Submitting the Report:

- Edit the report, including spelling and grammar, as well as formatting and pagination. Double-check all facts and proofread the text carefully. Remember that the report is read by many different people including your program staff, Accreditation Commissioners, and the museum.
- The report should be submitted as a Word document.
- Send your report to the Accreditation Program staff. Do not send a copy to the museum. Program staff review all reports before sending them to the Accreditation Commission. The report is forwarded to the museum along with the Commission's decision letter.
- Be timely, please. Email your report to the Program staff by the due date listed on the Important Site Visit Information Memo. Call us right away if you cannot meet the deadline.

### The Big Picture

Questions to keep in mind throughout the peer review process

\*Use your judgment! If you have any questions about what you should be looking for, please call the AAM staff!

#### Sustainability

- Is the museum doing what it needs to do in order to succeed both now and in the future?

#### Meeting mission

- Are the collections, programs, exhibits, documents, and resources in alignment with the mission?

#### Sufficient resources

- Are the resources of the museum sufficient to support the efforts of the museum, and are resources taken into consideration when choosing goals?

#### Thoughtful planning

- Is the institution engaged in an ongoing, strategic, and thoughtful planning process?

#### Relevance and Meaning

- Is the museum engaging with its communities and meeting their needs in a meaningful way that maximizes the museum's impact on its constituency?

# Accreditation Visiting Committee Report Writing Guide

Each section below includes a set of guiding statements or questions to consider. Respond only to points that are most relevant to the institution being reviewed. Be sure to provide an analysis of the museum's strengths as well as its weaknesses. For each section ask yourself the following questions:

- 1) Is the museum meeting AAM and Accreditation Standards?
- 2) Does it meet the Characteristics of an Accreditable Museum?
- 3) Is it in line with best practices?

## **INTRODUCTION (approximately ½ page)**

Include: Institution Name, City, State; Visit Dates; Visiting Committee Names, Titles, Institutions; and a brief description of the timeline of events for the visit. (If you would like to include an agenda and list of people you met with, please do so in an appendix).

## **EXECUTIVE SUMMARY (approximately ½ page)**

Provide a concise summary of the team's thoughts on how the museum meets program characteristics.

## **BRIEF INSTITUTIONAL HISTORY (approximately ½ page)**

Provide the institution's historical and physical context. Include a brief description of the museum's current situation and important elements from its past (i.e. date founded, museum's purpose, overview of exhibitions/collections, program highlights, etc.)

## **PUBLIC TRUST & ACCOUNTABILITY (approximately 1 – 2 pages)**

Take into consideration the following questions and give examples:

- 1) Is the museum a good steward of its resources held in the public trust?
- 2) Does the museum identify the communities it serves, and does it make appropriate decisions on how it serves them?
- 3) Regardless of its self-identified communities, does the museum strive to be a good neighbor in its geographic area?
- 4) Does the museum strive to be inclusive and offer opportunities for diverse participation?
- 5) Does the museum assert its public service role and place education at the center of that role?
- 6) Does the museum demonstrate a commitment to providing the public with physical and intellectual access to the museum and its resources?
- 7) Is the museum committed to public accountability and transparency in its mission and its operations?
- 8) Does the museum comply with all relevant local, state, and federal laws, codes, and regulations applicable to its facilities, operations, and administration?

## **MISSION & PLANNING (approximately 1 – 2 pages)**

Take into consideration the following questions and give examples:

- 1) Does the museum have a clear understanding of its mission and does it communicate why it exists and who benefits as a result of its efforts?
- 2) Are all aspects of the museum's operations integrated and focused on meeting the mission?
- 3) Do the museum's governing authority and staff think and act strategically to acquire, develop, and allocate resources to advance the mission of the museum?
- 4) Does the museum engage in ongoing and reflective institutional planning that includes involvement of its audiences and community?
- 5) Has the museum established measures of success and does it use them to evaluate and adjust its activities accordingly?

## **LEADERSHIP & ORGANIZATIONAL STRUCTURE (approximately 1 – 2 pages)**

Take into consideration the following questions and give examples:

- 1) Do the governance, staff, and volunteer structures and processes effectively advance the museum's mission?
- 2) Do the governing authority, staff, and volunteers have a clear and shared understanding of their roles and responsibilities?
- 3) Do the governing authority, staff, and volunteers legally, ethically, and effectively carry out their responsibilities?
- 4) Do the composition, qualifications, and diversity of the museum's leadership, staff, and volunteers enable it to carry out the museum's mission and goals?
- 5) Is there a clear and formal division of responsibilities between the governing authority and any group that supports the museum, whether separately incorporated or operating within the museum or its parent organization?

### **COLLECTIONS STEWARDSHIP (approximately 1 – 2 pages)**

Take into consideration the following questions and give examples:

- 1) Does the museum own, exhibit, or use collections that are appropriate to its mission?
- 2) Does the museum legally, ethically, and effectively manage, document, care for, and use the collections?
- 3) Is the museum's collections-related research conducted according to appropriate scholarly standards?
- 4) Does the museum strategically plan for the use and development of its collections?
- 5) Does the museum provide public access to its collections while ensuring their preservation and is this all guided by its mission?

### **EDUCATION & INTERPRETATION (approximately 1 – 2 pages)**

Take into consideration the following questions and give examples:

- 1) Does the museum clearly state its overall educational goals, philosophy, and message, and does it demonstrate that its activities are in alignment with them?
- 2) Does the museum understand the characteristics and needs of its existing and potential audiences and does it use this understanding to inform its interpretation?
- 3) Is the museum's interpretive content based on appropriate research?
- 4) If the museum conducts primary research, does it do so according to scholarly standards?
- 5) Does the museum use techniques, technologies, and methods appropriate to its educational goals, content, audiences, and resources?
- 6) Does the museum present accurate and appropriate content for each of its audiences?
- 7) Does the museum demonstrate consistent high quality in its interpretive activities?
- 8) Does the museum assess the effectiveness of its interpretive activities and does it use those results to plan and improve its activities?

### **FINANCIAL STABILITY (approximately 1 – 2 pages)**

Take into consideration the following questions and give examples:

- 1) Does the museum legally, ethically, and responsibly acquire, manage, and allocate its financial resources in a way that advances its mission?
- 2) Does the museum operate in a fiscally responsible manner that promotes its long-term sustainability?

### **FACILITIES & RISK MANAGEMENT (approximately 1 – 2 pages)**

Take into consideration the following questions and give examples:

- 1) Does the museum allocate its space and use its facilities to meet the needs of the collections, audience, and staff?
- 2) Does the museum have appropriate measures in place to ensure the safety and security of people, its collections and/or objects, and the facilities it owns or uses?
- 3) Does the museum have an effective program for the care and long-term maintenance of its facilities?
- 4) Is the museum clean and well-maintained, and does it provide for the visitors' needs?
- 5) Does the museum take appropriate measures to protect itself against potential risk and loss?

### **CONCLUSION (approximately 1/2 – 1 page)**

Summarize the major observations and the team's overall impression of the museum. Remember: Do **not** include an advisory conclusion in the text. Put that information on the Visiting Committee's Advisory Conclusion Form that both members sign and submit with your report. The conclusion form is not shared with the museum so feel free to be as honest as needed.

### **NOTED ISSUES (length as needed)\***

In addition to including the issues noted from the Self-Study Review Checklist and the previous Accreditation report in the relevant sections above, the Commission appreciates when the Visiting Committee pulls these issues out in a separate bulleted list or by another easy to find and read method.

### **APPENDIX**

You may include an agenda of the visit and/or a listing of any people you met or any other materials you feel would help the Commission in their review.



## Visiting Committee's Advisory Comment Form<sup>1</sup>

### What are the Visiting Committee's Advisory Comments?

Visiting Committee Advisory Comments are:

- Your candid, bottom line opinion/assessment of the museum's overall credibility, capacity, and sustainability, conveyed only to the Accreditation Commission.
- Things you want the Commission to know but did not put in the report; or positive/negative things in the report you want to emphasize or express more candidly.
- Not shared with the museum.
- Critically important to the Accreditation Commission to inform its decision-making.

### Instructions:

- Submit the team's Visiting Committee Advisory Comments by emailing this completed form to [WHO??@aam-us.org](mailto:WHO??@aam-us.org). (The form can be downloaded from INSERT LINK.) Alternatively, in lieu of using this form, you may submit your advisory comments directly in the body of an email.)
- Advisory comments are required; however only one form/set of comments needs to be submitted on behalf of the team.

### What should I say?

- Whether the museum meets accreditation standards or not. If applicable, cite specific accreditation standards/requirements the museum is not meeting (e.g., Characteristic of an Accreditable Museum, Accreditation Commission Expectation, required document, other standards).
- Give your opinion of the museum's overall credibility beyond just whether it is meeting the standards or not; does it appear sustainable for the long run; does it have the capacity to address any challenges that exist?
- If applicable, note any issues/practices, discussed in the report, that were either highly commendable or substantially lacking that you want to emphasize to the Commission.
- There are no parameters on length or format. One or two sentences are acceptable if you have no kudos or concerns to expand on.

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Name of Museum: \_\_\_\_\_

City, State: \_\_\_\_\_

Dates of visit: \_\_\_\_\_

Advisory Comments (Not shared with museum)

<sup>1</sup> Effective 10/09, this form replaces the Visiting Committee Advisory *Conclusion* Form. The Accreditation Commission no longer asks Visiting Committee teams for an advisory recommendation on what *decision* should be made (e.g., accredit/table/deny).