



Narrative Report

Audience and Purpose

Your report communicates the team's analysis of the museum's operations to the Accreditation Commission. It also will be part of the permanent record of the museum's participation in the program.

A fair and balanced report based on specific observations, critical thinking, and a collegial approach will contribute to the institution's growth and development.

The narrative report must *not* include

- a specific recommendation on accreditation
- recommendations or advice about specific museum operations and practices.

Purpose


The Accreditation Commission refers to the report during its decision-making process. It relies on an accurate, comprehensive, and thoughtful report to make a fair and informed decision. The quality and credibility of the report will determine how effectively it can be used for this purpose.


Following the commission's review, the report will go to the museum. Many museums use the report to:

- guide institutional planning
- prioritize needs
- catalyze change
- guide institutional growth and development
- affirm the things they are doing well
- orient new staff and governing authority members
- provide potential supporters with an introduction to the museum and its needs

Audience

The report should be written to and for the Accreditation Commission; however, the museum will have ultimate possession and use of it. You should be completely candid and honest in your description and analysis, but diplomatic and collegial in the phrasing. If you are finding that balance difficult for a specific visit, please contact the Accreditation staff or peer reviewer manager.

 *Report is an effective record of the visit and communication tool for other audiences. Report meets the needs of the program and its intended audience.*

 *Sample reports and excerpts of reports may be found on the Peer Reviewer Section of the AAM Web site: www.aam-us.org/peer-review*

Organization, Tone, and Writing Style

Organization

The report should include the elements listed below. Most reviewers find 12-15 double-spaced pages sufficient for detailing all areas of operation covered in the *Accreditation Self-Study Questionnaire* and *Museum Accreditation: Criteria and Characteristics*.

Introduction

This element should include:

- when the visit took place
- the names and titles of the team members
- a brief overview of whom you met (if needed, a detailed visit agenda can be included as an attachment).

Executive Summary

A brief review of the significant observations.

Brief Institutional History

Provide a brief description of the current situation of the institution as well as important elements from its past. Describe any areas of concern to which the Accreditation Commission gave specific attention. If you are conducting a subsequent review, describe any concerns raised in the previous visit. There is no need to include basic facts that can be found in the self-study materials.

Body of the Report

There is no "right way" to organize the report; the important thing is to identify each topic clearly. Following the order of the *Guide to the Characteristics of an Accreditable Museum* (see page D5) will help you ensure that each topic is addressed. Headings, italics, bold type, and bulleted lists all will help make the report easy to read, understand, and use.

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Summary

At the end of the report, sum up your major observations, highlighting model documents and practices and noting deficiencies without making recommendations for future actions. Be careful not to directly or indirectly communicate to the museum the team's advisory conclusions. That information is for the attention of the commission alone. As the commission's decision may differ from that of the team, the museum may receive confusing signals if the team's conclusion is apparent in the report.

Report is written and organized so information follows a logical order and is easy to reference. Report incorporates program format. Only a few minor changes by staff required.

Report generally uses the recommended format, or deviates in a thoughtful and effective way. Report organization supports the understanding and use of the information (e.g., sections and headers).

No mention of the Advisory Conclusion is present in the report.

Tone and Writing Style

The tone of an accreditation report is professional, objective, and diplomatic. It is also free of consultative remarks and recommendations; advice on how to remedy issues of concern and suggestions for changing operations are not appropriate and must not be offered.

Reports are most effective when they are:

- concise
- diplomatic
- thoughtful
- balanced in analysis, combining praise and constructive criticism

Report makes a balanced presentation of the strengths and weaknesses of an institution. The report avoids criticism of individuals.

Meeting the Program's Purpose

The *Eligibility Criteria, Guide to the Characteristics of an Accreditable Museum*, and the Accreditation Commission's Expectations provide the outline for the report's content. The report serves two purposes:

- Primarily, to meet the needs of the Accreditation Program by
 - communicating your team's observations of the museum to the Accreditation Commission
 - providing an accurate and comprehensive review of the museum's operations
- Secondarily, to provide the museum with
 - an accurate description of the institution's current state
 - a comprehensive analysis of the strengths and weaknesses of the museum's operations

This section explains how to craft the report to best meet the needs of the Accreditation Commission and the Accreditation Program. This also will ensure that the museum receives a comprehensive, thoughtful, and diplomatic report that will serve as a tool for future planning.

Review of Operations

Present a full picture of the museum, touching on all the areas of operation. Throughout the report, analyze your team's observations in terms of the two core questions of the accreditation review process:

- 1. How well does the museum achieve its stated mission and goals?*
- 2. How well does the museum's performance meet standards and practices as they are generally understood in the museum field?*



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A complete accreditation report includes:

- analysis comparing the museum’s operations to *A Guide to the Characteristics of an Accreditable Museum* and the *Accreditation Commission’s Expectations*
- verification that the institution continues to meet the program’s *Eligibility Criteria*
- verification that the required documentation is in place and shows that the museum is aware of current and evolving professional practices and standards

The required documents must be current and bear evidence of approval by the museum’s governing authority where necessary and appropriate. The report should include a description of any discrepancies between the museum’s documentation and operations with reference to the commission’s most current expectations in these areas.

Examine the museum’s situation at the time of the visit, “connecting the dots” between areas of operations and issues. Consider how the museum stands in relation to its mission and goals, its planning for the future, and its long-term sustainability.

Report covers the complete range of operations included within the scope of the review.

Report contains sufficient and appropriate description and analysis to meet the decision-making needs of the Accreditation Commission.

Report provides insight into the underlying structure, operations, and issues of the institution.

Standards and Best Practices

The Accreditation Program’s purpose is to reflect, reinforce, and promote the best practices in museums, emphasize museums’ accountability to the public they serve, and recognize excellence within the museum community. *A Guide to the Characteristics of an Accreditable Museum* reflects the program’s core values and concepts.

Describe, using examples, how the museum does or does not demonstrate the characteristics and whether the required documentation is in place. Discuss whether its practices and documents reflect an awareness of current and evolving professional practices and standards.

Program materials and requirements are effectively incorporated into the report. Additionally, report addresses whether progress was made regarding any concerns raised through the Self-Study Checklist or in previous reviews.

Report analysis is consistent with standards and best practices.

Analysis of Strengths and Weaknesses

Present a balanced review of the museum by identifying areas the museum is excelling and areas of concern. While the Advisory Conclusion of the team should not be expressly or indirectly communicated, the description and analysis should support it.

Report identifies an institution’s operational strengths and weaknesses with sufficient depth and analysis to support planning and decision-making. Analysis sufficient to inform the Accreditation Commission.

Advisory Conclusion is in agreement with the description and analysis presented in the report.

Comprehensiveness

It is important for the commission’s discussion that the report examine and describe each area of the museum’s operations. The commission, and ultimately the museum, should hear about areas where the museum is functioning effectively or exceptionally, as well as about problems, through specific examples. If an aspect is not mentioned in the report, the commission cannot determine whether it was reviewed and considered acceptable or not reviewed at all.

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☉ Language and description is sufficient to give someone who did not participate in the site visit a clear picture of the institution.

☉ Report provides a whole and accurate picture of the museum's unique operations with thorough analysis that meets the program and institution's needs.

Museum-specific Issues

Each museum is reviewed individually, in light of its own mission, history, and development. Reflect in the analysis how any unique aspects of the museum compare to the characteristics, both positively and negatively. Address areas of special attention as described in Accreditation documentation.

☉ Report incorporates the issues and circumstances unique to the participating institution throughout the report.

Reviewing for Accuracy

Please double-check all facts and proofread the text carefully. Changes in wording can turn an aggressive comment or a consultative remark into an objective criticism. Small errors, such as misspelling a staff member's name, can undermine the credibility and effectiveness of an otherwise excellent report.

The report should be free of grammatical, spelling, and typographical errors. A spell-check and review by you saves a great deal of Accreditation staff time and ensures a higher level of credibility for the report.

Review the text a final time to remove or edit any consultative language.

☉ Report language is clear and ideas are easy to identify and understand.

☉ Report contains only a few minor errors that were easily corrected by staff.

☉ Report does not include inaccuracies or misrepresentations related to the museum under review.

Submitting the Report

Format

When submitting your report to the Accreditation staff, please include the following:

- The report

Please submit the report electronically (via e-mail to accreditation@aam-us.org or via diskette to the address below), Microsoft Word preferred. If you are unable to submit the report in this format, call the Accreditation staff (202/289-9116) to work out alternatives.

- Advisory Conclusion Form, signed by each team member

The signed Advisory Conclusion form must be mailed to the address below. It can be faxed in addition (202/289-6578), but the original still must be mailed.

- Self-study materials

The self-study materials are used in the commission's review and need to be returned promptly to the address below (see also Wrapping Up, page D38).

Accreditation Program
American Association of Museums
1575 Eye Street N.W., Suite 400,
Washington, DC 20005

- Travel expenses form for reimbursement and all supporting receipts (if not already submitted)


Deadline

Your final report is due to the Accreditation staff four to six weeks after the site visit. It is crucial that you meet this deadline. AAM has found that if more time




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than this elapses, other priorities begin to claim your attention and time and the currency of the report's information decreases. Writing the report soon after the visit will keep your memories fresh and lead to a more specific and stronger document. Your report deadline may be adjusted to meet an upcoming agenda deadline.

 *Shortly after the end of the visit, write down your initial thoughts, starting an outline from which you can build the report. This helps keep your ideas fresh and gives you a place to start when you sit down to write. You may want to do this right after the exit interview, on the trip home, or the day following the visit.*

The Accreditation Program is committed to providing a report to the commission in a timely fashion and moving the museum through the accreditation process in a timely manner. The ability to fulfill that commitment rests in your hands. Please contact the Accreditation staff if you are unable to meet the deadline. A late report can push a museum's review to the next available Accreditation Commission agenda, delaying its decision several months.

 *Reviewer met all program deadlines within 15 business days or contacted program staff to discuss challenges or needed extensions.*

Staff Review for Commission Agenda

Creating the report for the museum is result of a collaborative process, primarily between yourself and your team member. The process does not end when the report is submitted to the Accreditation staff, who read all reports before the Accreditation Commission meeting and evaluate them according to the Evaluation Rubric (pages E12–E17).

Reports may be edited by Accreditation staff for

tone, grammar and spelling, and consultative advice. A report with significant problems may be returned to the Visiting Committee for revision.

After the Accreditation staff ensures the report is in keeping with the needs of the program, you may be contacted to:

- clarify certain points
- add additional analysis
- provide additional support for the team's advisory conclusion
- make substantive changes to tone or content

This editorial process helps maintain the consistency of the Accreditation experience for all participants and is part of your commitment to the program.