



Accreditation Visiting Committee Quick Reference Guide

This Guide complements your *Peer Review Manual*. It highlights the basics of each step of the site visit process and references sections of the *Manual* that have the full details you will need to read. The relevant section and page(s) of the *Manual* are indicated in parentheses. In addition to your printed version, for your convenience the *Manual* is available as a PDF on AAM's web site: www.aam-us.org/getinvolved/pr/pr_main.cfm.

Additional references and resource materials are listed at the end of this document.

Before the Visit: Preparation

1. Review Your Roles and Responsibilities

Go over the specific duties of the Team Contact and the Team Member **(D23-24)**, and review the Site Visit Expectations **(D10-11)**, and the Visiting Committee Position Description **(E8-11)**.

2. Review All Documentation (D27)

Prior to the visit, ensure you have a thorough understanding of the institution by reading the entire Self-Study—questionnaire and supporting documentation—so you will be able to compare it to the museum's actual practices while on-site, set an appropriate visit agenda, and identify any additional materials you need to ask for in advance.

3. Set the Agenda/Work with the Team Contact to develop the Agenda (D28)

Use *A Guide to the Characteristics of an Accreditable Museum (D5)*, refer to your notes and questions, and consult with your team partner and the museum to develop an agenda that will provide you the time to:

- gain insight into daily operations
- verify the Self-Study and supporting documentation
- answer any questions or concerns that emerge from your review of the materials (*especially* any cited for special attention by the Accreditation Commission in the museum's Interim Approval decision letter and/or cited by staff in the museum's Self-Study Review Checklist)
- visit any off-site facilities
- get full participation of all key museum staff and stakeholders
- reflect, discuss, and take notes privately together
- (if a subsequent accreditation review) gauge what/whether the museum has made progress since its last review.

4. Travel Arrangements and Logistics (D25-26; E10)

The site visit is a professional business trip that typically includes transportation (airfare and/or car rental), hotel accommodation, and meals. The museum and peer reviewer should agree to all travel arrangements in advance, particularly for any unusual or very high expenses, to ensure that the plans are reasonable, appropriate, and acceptable to

both parties. The museum covers all expenses of the site visit. AAM reimburses the peer reviewer's documented, out-of-pocket costs, and then invoices the museum for that amount.

On Site: Conducting the Visit (D29-32)

1. Starting Off

Before arriving at the museum, get acquainted with your team member, compare notes, and outline your strategy.

2. Interview with the Director

Interview the director at the beginning of the visit:

- set the tone for the visit by stating the purpose of your role during the visit
- confirm the confidential nature of the information gathered
- review the agenda
- ask questions and clarify aspects of the review and museum's operations
- gather and review any new information or documents
- emphasize that you will not offer any recommendations or discuss your opinions about the Commission's decision

3. Interview with Staff & Governing Authority

Meet with key staff and members of the governing authority (individually and/or as a group depending on size and time). These interviews must be thorough and candid and should take place in private, without the director present, to provide an opportunity for open discussion.

4. Tour all Facilities

Visit all public and behind the scenes spaces; schedule time to visit off-site storage facilities or branch/satellite sites.

5. Exit Interview

Always schedule an exit interview. During the exit interview, ask for the director's observations about the process, verify that the factual information you gathered is accurate, and describe the Visiting Committee's general observations, citing any areas of significant concern you have. Remind the director that the Commission is the final decision maker and will use the report in conjunction with the museum's other materials.

6. Final Team Meeting and Your Advisory Comment Form

Before leaving, develop a consensus with your partner about the team's conclusion(s) and discuss what you want to say on the Visiting Committee's Advisory Comment Form located on the back of the Visiting Committee Report Writing Guide. Remember the Advisory Comment Form is your chance to candidly communicate what you saw, give your bottom line opinion/assessment of the museum's overall credibility, capacity, and sustainability, conveyed only to the Accreditation Commission. You can also include things you want the Commission to know but did not put in the report or anything you want to emphasize.

Tip: Shortly after the end of the visit, keep your ideas fresh by writing down your initial thoughts in the form of an outline from which you can build the report.

After the Visit: Writing the Narrative Report (D33-37)

- Writing the report soon after the visit will keep your memories fresh and lead to a more specific and stronger document. AAM staff have observed that as time elapses, other priorities begin to claim your attention, and the freshness of your memory about the details decreases.
- See pages **D33-37** for format, writing style, and content guidelines/instructions. Please also refer to the Visiting Committee Report Writing Guide.
- The report communicates the team's analysis of the museum's operations to the Accreditation Commission—the primary audience for the report. The Commission relies on an accurate, comprehensive, and thoughtful report to make a fair and informed decision.
- Following the Commission's review, the report will be sent to the museum. A fair and balanced report based on specific observations, critical thinking, and a collegial approach will contribute to the institution's growth and development.
- Be completely candid and honest in your description and analysis, but diplomatic and respectful in the phrasing.
- *Reminder:* do not include any advice on what to do, or how to do it.
- Call the Accreditation Program staff if you need any help crafting the report (e.g., need guidance on the best way to approach a significant problem area, etc.).

Wrapping Up: Submitting the Report and Returning Materials (D36-38)

Please submit your report and return the Self-Study materials on time. If you need additional time, please contact the Accreditation Program staff as soon as possible to let them know. Lateness may result in the museum getting bumped to a later Accreditation Commission meeting agenda, delaying its final decision by several months.

To complete your assignment, submit:

1. The Report

- Please submit a Word version of the report via e-mail to: Accreditation@aam-us.org.
- Please give the report a once-over to ensure there are no spelling/grammar errors or typos.

2. Advisory Comment Form

- You can either fax in the form (fax: 202-289-6578), e-mail an electronic version or just write an e-mail with the comments in the body.

3. Self-Study Materials

- Return ALL the Self-Study materials (questionnaire and supplementary documentation) you received, plus any additional materials picked up on-site (e.g. the briefing book), to the Accreditation Program staff. (**Do not return them to, or leave them at, the museum.** The Accreditation Commission needs the materials for its review.)
- Send them back as soon as possible after submitting the report. You can claim shipping expenses on your travel reimbursement form, or use AAM's UPS/FedEx account number located on the Self-Study Materials & Shipping Info form.

- Please try to return the materials in the same condition you received them.
- If you removed any documents from the Self-Study binders, please put them back in, especially the Self-Study Checklist and the previous Visiting Committee report.

A member of the Accreditation Commission or the Accreditation Program staff may contact you with questions about the report or the visit.

After the Commission meeting during which the museum you visited is examined, you will receive a copy of the Commission's official decision letter. Once that happens, please destroy any remaining notes you have from the visit and remember to maintain the confidentiality of the decision and the museum's details.

Additional Resources and Reference Materials

You will find links to the following at **the Help Desk for Visiting Committee Members** page of the AAM web site (www.aam-us.org/getinvolved/pr/Help-Desk-for-Visiting-Committee.cfm)

- Visiting Committee **Forms** (Report Writing Guide with Advisory Comment Form and Travel Expenses Forms)
- Accreditation **Standards** (Accreditation Commission Expectations and the Characteristics of An Accreditable Museum)
- **Eligibility Criteria** for Participating in the Accreditation Process
- Site Visit Expectations
- Team Contact and Team Member **Duties**
- How Peer Reviewers are **Evaluated**
- Policy on **Confidentiality**: Peer Reviewer Responsibilities
- Resources and Tips on Interviewing, Listening, and Facilitating
- General Resources for Effective Peer Review (professional associations, publications, etc.)
- The AAM Information Center
- Back Issues of **NEWStandard**, the peer reviewer newsletter

THANK YOU FOR VOLUNTEERING TO BE PART OF THIS IMPORTANT PROCESS!
WE APPRECIATE YOUR TIME AND HARD WORK.

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