

What's the BIG IDEA?

This feature presents the history, theory or critical points of the theme to provide a broad context for the issue.

Advisor or Observer? Your Role as Peer Reviewer

Karen Topping, Peer Reviewer Manager

Elizabeth Merritt, Director, Museum Advancement & Excellence

Many museum professionals join the ranks of AAM peer reviewers because they want to help museums and “give back to the field.” And, gratifyingly, museums participating in MAP and Accreditation consistently report that they value the attention of peer review. However, the nature of the help offered through peer review is fundamentally different in Accreditation than in MAP. This often proves confusing for peer reviewers who serve both programs, and frustrating for Accreditation Visiting Committee members who are instructed not to be “consultative.” For that reason, we are devoting this issue’s column to an exploration of the dynamic between the peer reviewer and the museum under review. For Accreditation peer reviewers, this is crucial reading; we hear from many Visiting Committee members who have questions about the program’s expectations on this point or the reasoning behind it. MAP Surveyors are advised to read on as well—many museums use MAP as a tool to prepare for an Accreditation visit or to respond to a tabling decision of the Commission. Being familiar with the role of Visiting Committee members will enable you to help the museum develop realistic expectations of their Accreditation experience.

The Museum Assessment Program is explicitly consultative—the role of the MAP Surveyor is to compare the operations of the museum to standards and best practices in the field, observe where they fall short, and to give specific advice about how the museum can improve.

The Surveyor’s insight into issues, suggestions for resources, and guidance is critical to the success of a MAP assessment. Successful peer review in MAP is marked by satisfied museum staff who feel they have received helpful and realistic suggestions. Many museums participating in MAP rank peer review as the most valuable part of the assessment.

In Accreditation, the primary role of the Visiting Committee member is to serve as the “eyes and ears” of the Accreditation Commission—to advise them whether the museum’s completed Self-Study accurately reflects its operations, and whether the museum meets the program requirements as described in

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THEME

This issue of *NEWSStandard* articulates the complementary yet distinct relationship between MAP and Accreditation reviews.

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What's the Big Idea

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Museum Accreditation: Criteria and Characteristics and the

Accreditation Commission's Expectations. It has always been acknowledged that a museum may find this process beneficial—the Visiting Committee report can help the museum recognize and document deficiencies that need to be addressed. However, this is not the primary purpose of the report, nor is it the role of the peer reviewer to give advice on how deficiencies can or should be addressed. Why not? Often the museum will want and ask for such advice, and as people of good will, Visiting Committee members may want to offer it. And, in fact, in the early years of the Accreditation Program, such recommendations were permitted if not encouraged.

So why the difference? Over the course of the 30 years of the Accreditation Program, staff have discovered that advice offered in the course of an accreditation review often causes the following problems:

- **The museum regards the Visiting Committee's advice as definitive, representing the official opinion of the Accreditation Commission.** It is not, of course—it is advice offered on the basis of the opinions and experience of the Visiting Committee, and, as such, is probably very good advice. However, museum staff often assume that following this advice guarantees they will become accredited. This is not true—the Accreditation Commission, while guided by the advisory conclusions of the Visiting Committee, is not bound by them. A museum tabled by the Accreditation Commission that responds by implementing the advice of the Visiting Committee may find that these actions do

not, in fact, satisfy the concerns of the Commission. This makes the museum representatives understandably angry, as they feel they have received mixed messages.

- **The museum regards the advice as directives, and resents the Commission (and AAM) for “telling them what to do.”** Because of the status of accreditation, and the amount of time and effort that goes into becoming and staying accredited, the process cannot help but share the reputation of the proverbial 900-lb. gorilla. Often a Visiting Committee offers advice with good will, only to unintentionally create the perception that this is a prescription from the Commission (“do this or you will not be accreditable”). Understandably enough museums react very defensively when they feel this is happening. Some go to the length of hiring lawyers to respond to the Visiting Committee report, proving why they are not obligated to take these steps. This demonstrates how a suggestion may be mistaken for a directive in the context of accreditation.
- **The advice creates the wrong impression that, in Accreditation, there is “one right answer.”** In fact, the Commission looks not for “the answer” but for indications that the museum is thoughtfully considering each issue, conducting institutional planning to address it, and weighing the resources, both people and financial, needed to fulfill that plan. For example, a Visiting Committee may accurately note that there is a lack of environmental controls in the collections storage areas. How the museum is addressing this issue will depend on the museum's own unique cir-

Establishing Your Role

Margo Dundon, President & CEO, Museum of Science and History, Jacksonville, Fla.

cumstances. The Commission will not dictate one particular solution (e.g., “build a new storage facility,” “retrofit the HVAC,” or “buy better storage cases to buffer climate changes”) but looks for overall evidence that the museum is taking appropriate steps to responsibly care for the collections in line with current standards and Accreditation Program requirements.

More fundamentally, however, there is the problem that it is impossible to play two roles at once with equal effectiveness. The Visiting Committee’s primary function is to assist the Accreditation Commission. To also take on the role of assisting the museum is to create a different and conflicting purpose. The credibility of the Accreditation Program depends on the acceptance by the field that the process is fair, objective, and unbiased. Visiting Committee members cannot uphold their role of fair, objective, and unbiased observers of the museum’s current practices while commenting on how the museum *should* be operating.

So how can this not be a frustrating experience for the Accreditation peer reviewer? It is a human impulse to want to help—how can you help the museums you review if you cannot offer advice? You can help by ensuring that the museum clearly understands both the standards and best practices upheld through the Accreditation Program, and your observations of how they are or are not meeting these expectations. In the exit interview of the visit, you should review with the director any areas of concern you will comment on in your report, as well as underscore that the Commission is the body making the ultimate decision based on

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Over 1,100 museum professionals support the Accreditation Program and Museum Assessment Program as peer reviewers. Twenty-one percent of peer reviewers are active in both programs. Although the programs share many attributes, they differ in key ways and knowing your role for an assignment is critical.

Both Accreditation and MAP encourage excellence through examination against current standards and best practices and evaluation of museums in light of their missions and resources. However, the purposes of both programs differ markedly. Therefore, peer reviewers are called upon to conduct MAP assessments differently from Accreditation reviews, to provide entirely different work products, and ultimately, to serve a different audience. Being clear about the audience from the start can help a peer reviewer identify the appropriate approach to her visit and report and facilitate the best outcomes.

MAP helps museums recognize their strengths, identify areas of operations that fall short of current standards and practices, and provide practical advice and direction for institutions. The role of the MAP peer reviewer (Surveyor) is consultative. A Surveyor works in partnership with a participant museum to address institutional concerns and set priorities for change. A Surveyor addresses the needs of the participant museum as identified in its Self-Study and program application, and those identified during the course of the visit.

While a museum participating in Accreditation certainly benefits

from self-assessment and the status and benefits attendant to accreditation, the purpose of the program is not to render advice and assistance. Accreditation promotes excellence by certifying institutions with high standards of operations. Accreditation peer reviewers (Visiting Committee members) are called upon to be the eyes and ears of the Accreditation Commission. As a team, they examine the performance of a museum, determine if operations are accurately reflected in the Self-Study documents, and submit their observations to the Commission. Visiting Committee members report to the Accreditation Commission.

MAP and Accreditation share some similarities in each phase of peer review work. The differences can be understood through an examination of roles in each of the three work phases: preparation, the site visit, and reporting.

PREPARATION

Depending upon the type of assessment, a MAP assignment may require a single Surveyor or a team. The Accreditation Visiting Committee is always a team of at least two reviewers. Whether acting alone or as a team, peer reviewers communicate with the participant museum, establish agendas, arrange travel, examine the institution’s self-study, and request any needed additional information.

Perhaps the most important difference in this preparation phase is in the content and tone of communications with the participant museum. A MAP Surveyor may begin the process by identifying and discussing institutional concerns

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Peer Reviewer Handbooks Meet the Real World

Karen Topping, Peer Reviewer Manager

The report you write will stand as the record of the peer review process for a museum. Lasting beyond a MAP grant deadline or an Accreditation review, each report ideally serves as a key document supporting the evolution of the participating institution. As such, it may be shared with current and future board members, funders, staff, and others. It is critical that the report reflects the core purpose and philosophy of the program for which it is written, whether MAP or Accreditation.

For both programs, the basics of format, content, tone, and logistics of the report are described in their respective handbooks. Each handbook can be downloaded from www.aam-us.org/peer-review. The “Critical Issues Checklist” (for each MAP Assessment) and *Museum Accreditation: Criteria and Characteristics* provide a conceptual

framework for a report. I encourage you to make use of these guiding documents every time you are sitting in front of a blank computer screen and a set of notes.

This article will look at how two challenging report-writing scenarios might be approached from a MAP or Accreditation perspective.

SCENARIO #1: THE “OH MY ...” MUSEUM

After carefully reading through the Self-Study and supporting documents and creating a visit agenda, you arrive at the museum. As the visit progresses, you become increasingly aware that this university-based institution has serious deficiencies in almost every area of museum operation. The collections are not stored appropriately; records are not up to date. The exhibits are in fair to poor condition, and the environmental condi-

tions do not seem to be well managed. The employee manual is lacking a few key policies for staff, and there is no documentation for volunteers at all. The financial situation is based on yearly income from school groups and a meager membership base, and the museum has no endowment.

But, the staff, small and overworked as it is, seem dedicated to the museum and eager to do well. The influential “Friends” group is dedicated to the museum and has been involved in supporting many of the operations as volunteers.

What do you write?

MAP: An Assessment Report relies on several key components to make it an effective tool, including: Constructive critique of the current museum operations in relation to standards and best practices of the museum field and the museum’s mission and resources; practical and achievable recommendations for addressing key issues; a variety of resources for implementing those

TAKE-ALONG TIPS

This feature includes suggestions from peer reviewers to make your work easier and more effective.

MAP/Accreditation

Patricia Miller, Illinois Heritage Association, Champaign, Ill.

As a peer reviewer for both MAP and Accreditation, I find that I really have to keep my mind focused on whichever one I’m doing. The two words “detachment” and “engagement” sum it up for me. With an Accreditation visit, I make an effort to be detached, observant, and somewhat impersonal. I feel that I am a reporter gathering impressions and compar-

ing them to the written documents and visual materials that have been assembled by the museum. In writing the report I try to paint a picture of what I have seen in person, confirming the documentation or noting areas of operations that are deficient. I review the standards that accredited museums must meet and evaluate whether this museum meets these requirements. To do less is to invalidate the program, even though we all want the museums we visit to achieve accredited status.

With MAP, I try to soak up as much information as I can about the museum and its history. I become engaged in the museum’s story and its mission. I develop a good rapport with the people involved in supporting the museum. I feel empathy for them. I try to help them understand the consequences of certain decisions they may be facing and suggest resources that may help them to achieve their goals. When it’s time to leave, I usually wish I could stay on and help them meet their next challenge.

suggestions; and a positive and motivational tone. For this institution, each of the issues may be critical to the overall health of the institution; however, a laundry list of problems will likely discourage a well-meaning and under-resourced staff. This doesn't mean you should ignore weaknesses, but combine suggestions for quick and easy fixes with identification of a few (two or three) overarching issues to address through institutional planning. Then provide resources to help staff develop a strategy for documenting and prioritizing solutions. Show them the light at the end of the tunnel.

Accreditation: Faced with the frustration of reporting about a museum so far from the ideals of Accreditation can be a challenge, particularly if they are already accredited. Often pervasive small problems point to one or more "big picture" issues. It is this analysis that the Accreditation Commission finds most valuable in its decision-making. In this example it may be that the university and museum do not collaborate in their planning process to ensure ongoing financial support for the museum, or that the mission of the museum does not provide enough guidance for clear decision-making. By concentrating on underlying issues, you may help the museum leverage support and guide future planning.

SCENARIO #2: THE "MIXED MESSAGES" MUSEUM

In initial conversations, the director seemed to imply that the museum would be just fine if the board let her do her job. This sentiment is repeated during your first meeting with her. She displays faith in her staff, enthusiasm for the museum and its mission, and a love of the objects, but is frustrated with her

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PEER REVIEWER MANAGER'S CORNER

Recruiting • Supporting • Developing Peer Reviewers

As you receive this, preparation for AAM's Annual Meeting and MuseumExpo™ 2002 is in full swing. The AAM staff is gathering hand-outs, finalizing events, and confirming speakers, all to make the Dallas meeting the best it can be. This year's meeting features several events and activities specifically for peer reviewers that I hope will add value to the experience for you and improve the peer reviewer program at the same time. They are described on the reverse of the reception invitation enclosed with this issue.

For other workshops and sessions that may be of interest to peer reviewers see "Opportunity Knocks." The Evaluating Governance workshop is proposed for this fall for the SEMC and NEMA conferences. If you cannot join us in Dallas, consider registering for this valuable opportunity this fall! For further information and to register, check the AAM Web site (www.aam-us.org) or contact me.

In continuing efforts to strengthen the peer reviewer program within AAM by clarifying our policies and practices, the eligibility qualifications and the performance expectations for peer reviewers are currently under discussion. The MAP Advisory Committee, the Accreditation Commission, and the newly created Peer Reviewer Advisory Committee have provided valuable input (see www.aam-us.org/peer-review/resources.htm for more information). A draft of "Peer Reviewer Qualifications for Service" will be presented for your comment at the Peer Reviewer Roundtable in Dallas. If you are not able to join us in Dallas, please take time to review this document on the peer reviewer section of the AAM Web site and give us your thoughts (we expect it to be posted by the time you receive this newsletter). Final drafts will be presented to the MAP Advisory Committee and Accreditation Commission over the next few months, and a final version will be posted on the Web site and distributed in the fall of 2002.

This document identifying eligibility criteria and performance expectations will shape further discussions on recruiting efforts, development opportunities, and resulting consequences if the performance expectations or eligibility qualifications are not met. Throughout this process, we will work carefully to balance the needs of the museums participating in MAP and Accreditation, the resources and needs of the peer reviewers, and the needs of the programs and AAM. As the results of these discussions will influence all of you and the work you do, I strongly encourage you to read through drafts and provide feedback. Thank you all in advance for your participation and help.



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REFERENCE DESK

This feature provides annotated references of articles, Web sites, books, and more that relate to the newsletter theme. You are encouraged to submit annotated references that you have found helpful.

In addition to AAM, a number of organizations have articulated standards and best practices for particular aspects of museum operations or for segments of the museum profession. The following is a partial list that may be useful as resources for museums in MAP and as additional guidelines to be incorporated into Accreditation reviews where appropriate.

Accreditation Commission Expectations

The AAM Accreditation Commission has issued expectation statements on mission, institutional planning, institutional code of ethics, delegation of authority, resolution of permanence, and collections stewardship. Available on the AAM Web site (www.aam-us.org/accred.htm).

ACM Standards Document

Developed by the Association of Children's Museums. Available for purchase from ACM (www.childrensmuseums.org).

Professional Practices in Art Museums

Developed by the Association of Art Museum Directors. Available for purchase through the AAM bookstore (www.aam-us.org/text/bookstore.htm).

Recommended Practices for Railway Museums

Developed by the Association of Railway Museums. Available on the ARM Web site (www.railwaymuseums.org).

SPNHC Guidelines for the Care of Natural History Collections

Developed by the Society for the Preservation of Natural History Collections. Available on the SPNHC Web site (www.spnhc.org).

Standards and Practices for Historic Site Administration

Developed by the Tri-State Coalition for Historic Places. Available for purchase from the Heritage Investment Program, 100 S. Broad St., Philadelphia, PA 19110. Phone: 215/569-2896.

Standards and Best Practice in Museum Education

Developed by the Committee on Education (EdCom), a Standing Professional Committee of AAM, this site includes the recently adopted *Excellence in Practice: Museum Education Standards and Principles* which will also appear in the May/June issue of *Museum News*. Available on EdCom's Web site (www.edcom.org/about/standards.shtml).

Standards for Museum Exhibitions and Indicators of Excellence

Developed by the Standing Professional Committees Council of the American Association of Museums. Available on AAM's Web site (www.aam-us.org/spcs.htm) on the National Association for Museum Exhibition's page.

On the Ground

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interactions with the board. In meeting with individual board members throughout the day, you hear that each one loves this institution and is dedicated to making it work, but feels that the director doesn't listen to them. The museum's operations are in pretty good shape. They are financially sound if not watertight. The programs encompass the collections, and there are offerings for school groups, families, and adults. The front desk staff is welcoming and knowledgeable about the museum's mission, even pointing out specific exhibits or programs to visitors. The collections are accessioned, although there appears to be a backlog of cataloguing. The skilled and enthusiastic staff is aware of the tensions between the director and the board. By the end of your visit, you are not certain of the cause of the tension and feel neither party is the sole cause.

What do you write?

MAP: "People issues" provide a true test of a Surveyor's professionalism and diplomacy. In this case, tone is of critical importance as the report needs to be read and accepted by both the governing authority and director for it to effect change. A clear, unbiased description of the issue as you perceived it is necessary, along with discussion on the ramifications of this situation and any positives you can identify. In this case, one strong positive is that both parties are truly dedicated to the institution. A shared dedication to the institution might be an opening to discussing the possibility that the community and/or staff may be receiving mixed messages about the leadership and direction of the museum as a result of the tension. A description of the appropriate roles of board and staff along with

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In Sight

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prior to a site visit to ensure that the institution's needs will be met. Contact by the Accreditation Visiting Committee chair with the participant museum is focused on the logistics of the visit and agenda.

THE SITE VISIT

Site visits for both programs include similar components such as a tour of facilities and meetings with key staff, members of the governing authority, and with other institutional stakeholders as appropriate. However, the difference in conduct during the course of these tours and meetings is critical. The key contrast rests in the difference between the give-and-take nature of discussion and the information-gathering purpose of an interview.

Being clear about the audience from the start can help a peer reviewer identify the appropriate approach to her visit and report and facilitate the best outcomes.

MAP Surveyors appropriately use both discussion and interview to accomplish their tasks, while Visiting Committee members rely on their interview skills, including rapport-building, careful listening, and clear questioning, to complete their work. Visiting Committee members primarily ask questions and listen; they do not offer advice or solve problems.

It is not uncommon during the course of a site visit for the Visiting Committee to be confronted by staff, members of the governing authority, or even the director asking the question, "How are we doing?" or "Do we pass?" According to *A Closer Look: The Accreditation Visiting Committee Handbook*, "under no circumstances and at no time is the Visiting Committee

to communicate its conclusions [regarding an accreditation decision] to anyone except the Commission." So, this can be an uncomfortable moment for both reviewers and anxious colleagues at museums undergoing examination. One response might be for Visiting Committee members to reply that they are gathering data and that it would be very helpful if the person posing the question could share what he or she believes to be the organization's strengths and weaknesses. Another suggestion is to emphasize that decision-making is the role of the Commission and the work of the Visiting Committee is advisory and will be considered along with the museum's Self-Study and documents. The Visiting Committee can suggest that the museum may contact the Accreditation Office for information on when the Commission will be taking up their review.

Site visits for both programs include an exit meeting with the director. In both cases, the meeting is an opportunity to check facts or clarify any information that may be confusing. It is also a good opportunity to ask the director for his or her opinion of the process. In the course of a MAP exit meeting, Surveyors should discuss their observations and offer some initial ideas about the content of the report. Surveyors may also discuss how the museum will use the report and implement changes. In an Accreditation exit meeting, the Visiting Committee does not discuss what its advisory conclusion to the Accreditation Commission will be, but may share any key concerns and issues that will appear in the report.

THE REPORT

In all cases, good peer review reports are timely, factual, objective,

diplomatic, concise, thorough, professional, and free of errors. MAP and Accreditation reports both assess the museum's ability to achieve its mission and identify areas where the museum does and does not meet current standards of the field. MAP reports are written for use by the museum. Although the report from the Accreditation Visiting Committee is shared with the participant museum, it is written for the Commission.

In addition, MAP reports offer suggestions for improvements, paying special attention to those areas of concern identified by the participant museum, as well as issues identified by the reviewer. They are encouraging in tone.

The Visiting Committee Narrative Report is free of advice and recommendations and is dispassionate in tone. The report attests to whether the museum meets the Accreditation eligibility criteria and how it does or does not demonstrate the characteristics of an accreditable institution. It also describes in detail those areas of operations that meet, exceed, or fail to meet professional standards and practices.

Respect is a common attribute that characterizes the good work of all peer reviewers whether acting as a Surveyor or a Visiting Committee member. Museums participating in MAP or the Accreditation process do so voluntarily. Every museum is a work in progress. To treat with dignity and respect the institution and the people who have invested their time and energy, regardless of where they are in their evolution, is the hallmark of the consummate peer reviewer. ■

What's the Big Idea

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more than just the report. This not only ensures that there will be no surprises when they read your written report, but gives them a chance to correct any observations that they feel are based on a misunderstanding of their operations. Reinforce this learning in the written report by not only providing a comprehensive review of the museum's operations but also, for any area in which the Committee identifies concerns or problems, referring to the relevant expectation against which they are being judged. While you are not recommending how the museum should address this problem, you are laying the groundwork for them to craft their own solution based on a thorough understanding of the expectations of the field. This enables museums to approach planning with a clear understanding of their needs, as well as to present a compelling case to governing authorities and funders.

On the Ground

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references on good governance may be helpful and, if it seems like it would be accepted, maybe a suggestion for outside facilitation.

Accreditation: The primary goal of a Narrative Report is to evaluate and represent accurately and fairly the current operations of the museum as they relate to the Accreditation Program criteria. In this case, while the interpersonal issues may be dramatic, the focus of the review should examine the areas of museum operations that might be affected by this relationship. Specifically, does the institution have a written delegation of authority, and is the practice in alignment with that documentation? Are there

In deciding what part of the peer review program is the "best fit" for you, consider which of these roles you feel most comfortable filling. Some peer reviewers find it more rewarding to work with MAP, offering advice and guidance to museums. Some peer reviewers may prefer to help through Accreditation, knowing that museums benefit from the chance to prove themselves in a rigorous and objective process. If you take on the challenging role of serving both programs, you may want to re-read this article from time to time before an assignment, to remind yourself which role is appropriate in each case.

It is our hope that this article has distinguished the roles of MAP and Accreditation peer reviewers and provided background on the development of the role of the Visiting Committee member. If you have any questions or comments on this material, please contact Karen Topping, Peer Reviewer Manager at 202/218-7688 or ktopping@aam-us.org. ■

job descriptions for the board members and the director? Is there evidence of successful institutional planning, financial oversight, and other board-director responsibilities? Examining these areas would both inform the Commission about the current institutional health of the museum and may enlighten the board and director to the possible effects of their disagreement.

For some comparative examples of language, visit the *NEWStandard* section of the peer reviewer Web site (www.aam-us.org/peer-review). If you would like to propose future scenarios to appear on the peer reviewer Web site, please e-mail Karen Topping at ktopping@aam-us.org. ■

OPPORTUNITY KNOCKS!

Keep an eye on this space in every issue for deadlines, important dates, and exciting opportunities of interest and benefit to peer reviewers and museum professionals.

ANNUAL MEETING EVENTS 2002, Dallas, Tex.

For more information, see www.aam-us.org/2002annualmeeting/index2.htm

- **Common Challenges and Best Practices in Starting and Running a New Museum** May 11; 9:00 – 4:00
- **Evaluating Governance: A workshop for AAM Peer Reviewers** May 12; 8:00 – 5:00
- **Leadership Through Diversity: Building Audiences and Strengthening the Workforce for Tomorrow's Museums.** May 12; Dallas, Tex. [AAM] also: July 26; Sacramento, Cal. [CAM], and October 16; Richmond, Virg. [SEMC]
- **It Ain't What It Used To Be: Reinterpreting Collections** May 13; 10:30 – 11:45
- **Peer Reviewer Roundtable/Round-Up** May 13; 3:30 – 5:00/5:00 – 6:30
- **We Will Survive with Help from Our Friends—Resource Sharing Networks for Disaster Preparedness, Response, and Education** May 14; 9:00 – 10:15
- **Reading Between the Lines—Four Perspectives on the Future of Exhibit Labels** May 15; 4:00 – 5:15
- **Moving towards Sustainability: Implications for Museums and Their Relationships with Their Communities** May 16; 10:30 – 11:45

PROFESSIONAL EDUCATION PROGRAMS

For more information, see www.aam-us.org/profed.htm.

- **Learning in Museums**
Museum visitors represent an infinitely diverse group of people. How can museums create programs, exhibits, and panel text that address the needs of a variety of learners and learning styles?
June 28 – 29; Nashville, Tenn.
- **Current Issues in Museum Management 2002** September 20 – 22; Orlando, Fla.

Museum Assessment Program/IMLS
application deadlines: November 1, 2002 & March 15, 2003

Accreditation Program application deadlines:
June 28, 2002, & December 31, 2002