

## A Guide to the First-Time Accreditation Process

The core architecture of the first-time accreditation process consists of an online Self-Study, a site visit from peer reviewers, and review by the Accreditation Commission. This process was streamlined in 2014 with the assistance of the museum field, utilizing shifts in policy, process, and technology to:

- Reduce the time needed to complete an accreditation review by 50% or more
- Place more emphasis on institutional impact and less on process/policy
- Change the Self-Study to a paperless online format

These changes have made the accreditation process simpler without diluting the standards.

### Steps in the Accreditation Process:

#### *Prerequisites*

- Before the museum can apply for accreditation, it must have taken the Pledge of Excellence and successfully completed the Core Documents Verification Program.

#### *Application*

- Complete the short online accreditation application, designed to collect information to help the Alliance staff determine if the museum is eligible and prepared for accreditation.
- Have an outside museum professional who knows the museum well and has experience with the accreditation process send a letter of support to AAM. The letter cannot come from a member of the governing authority.
- There is no application fee.

#### *Self-Study*

- Complete the online Self-Study, comprised of the following sections:
  - **Organizational Data** – Simple demographic questions such as museum type, governance, budget, and staff size.
  - **Museum Overview** – Questions that gather more detailed information about the museum's mission, collections, and other certifications; includes additional questions if the institution is (or is part of) a museum system.
  - **Operational Data** – Questions that gather detailed data on finances, facilities, human resources, attendance, and types of collections.
  - **Educational Role** – Questions about how interpretive content is developed and how the museum carries out its educational role, undertakes research, and evaluates impact and success.
  - **Public Service Role** – Questions about what the museum knows about its community and audiences, how it knows it, and how the museum reflects and serves those people.
  - **Collections Stewardship Role** – Questions cover all areas of collections management, including accessioning, deaccessioning, and loan practices; environmental conditions and controls; documentation; risk management and insurance; and preservation and conservation.
  - **Planning** – Questions about the museum's institutional planning process, ability to understand and plan for long-term change, and how it defines and measures success.
  - **Organizational Health** – Questions address governance, financial stability, staff, security, and emergency planning, as well as asking the museum to evidence that it operates in an accountable and transparent manner.
  - **Wrap-Up** – An accredited museum is more than the sum of its parts, so the museum is asked to summarize why it is important, to whom, and how it makes a difference.
  - **Attachments** – Eight required documents must be uploaded. Two others are required if applicable

and there are four optional attachments.

- **Help** – Definitions, resources, information on standards, and guidance on how to answer selected questions.
- A review fee based on the museum’s Alliance membership status is due when the Self-Study is submitted. Tier 3 members receive a significant discount.
- We may select your Self-Study attachments for inclusion in our Sample Documents Library, excluding your financial statements, 990, and budget attachment. We will not alter document content other than to redact proprietary security details or personally identifiable information. Unless you withdraw permission in writing, you are granting permission to the Alliance to distribute the remaining documents, in whole or in part, to Tier 3 Alliance members in electronic format via its website.

### Site Visit

- The site visit occurs during a predetermined window based on the museum’s Self-Study due date (see chart below).
- The museum vets a list of potential peer reviewers sent by its Accreditation Program Officer; the Program Officer ultimately selects the reviewers.
- The museum and the peer reviewers work together to set the specific dates for the 2-day visit (large museums and museum systems may add a 3<sup>rd</sup> day).

### Schedule

Application Submitted	Begin Self-Study	Self-Study Due	Site Visit	Commission Review
June 1	July	January 15	July 15 – Aug. 30	October
October 1	November	May 15	Nov. 1 – Dec. 15	February
February 1	March	September 15	March 1 – April 15	June

- The time from application submission to Commission decision is about 16 months. Museums required to remedy any issues during the process may require more time. See next page for a detailed timeline.
- Requests from the museum for extensions to the Self-Study due date or site visit period will be approved only in rare cases due to highly unusual extenuating circumstances.
- Once accredited, museums must undergo reaccreditation every ten years. In select cases the Commission may designate a shorter award period.

### Tips for Preparing for Accreditation

- Learn more about the process and the standards:
  - Talk to your colleagues at accredited museums or those who serve as peer reviewers about their experiences with accreditation.
  - Review the information on the Alliance website, including the Core Standards.
  - Read the AAM publication, “National Standards and Best Practices for U.S. Museums” and share it with the staff and governing authority.
- Take the Pledge of Excellence.
- Review the accreditation eligibility criteria to determine if the museum is eligible to apply.
- Undertake an assessment (e.g., Museum Assessment Program, Collections Assessment for Preservation, a consultant) to receive feedback on operations. Implement any recommendations prior to applying for accreditation.
- Develop the required core documents or review and assess already-existing documents against the requirements. Apply for and receive AAM Core Documents Verification.
- Gain support for seeking accreditation from the museum’s staff and governing authority.
- Build accreditation into your strategic institutional plan, allocating the time and resources (human and financial) you will need to prepare for and support the accreditation process.

- Review the list of Self-Study attachments to determine what other documents the museum needs to develop or update.

## Accreditation Timeline

<b>PREREQUISITE: TAKE THE PLEDGE OF EXCELLENCE</b>	Via online form or email	
<b>PREREQUISITE: COMPLETE CORE DOCUMENTS VERIFICATION</b>	Up to 2 months for AAM review once all documents submitted*	
<b>THE ACCREDITATION PROCESS</b>	<b>TIME for this phase (months)</b>	<b>CUMULATIVE TIME for the review* (months)</b>
<b>APPLICATION</b> <ul style="list-style-type: none"> <li>• Museum submits application online and has letter of support sent to AAM.</li> <li>• Accreditation staff reviews application.</li> <li>• If the museum is accepted, museum's assigned Accreditation Program Officer shares the link to the online Self-Study and confirms museum's accreditation review schedule.</li> </ul>	<b>2 (weeks)</b>	<b>2 (weeks)</b>
<b>SELF-STUDY</b> <ul style="list-style-type: none"> <li>• Museum spends 6-7 months completing Self-Study and uploading documents.</li> <li>• Museum submits all materials by assigned due date.</li> <li>• AAM staff thoroughly reviews materials for completeness and adherence to standards.</li> <li>• AAM staff sends results of review to museum.</li> <li>• Museum responds to review within one month by completing any requested edits to the Self-Study and/or submitting any missing documents.</li> </ul>	<b>8</b>	<b>8 ½</b>
<b>SITE VISIT</b> <ul style="list-style-type: none"> <li>• Site visit preparation process begins when museum submits Self-Study (Self-Study review and site visit preparation run concurrently for two months).</li> <li>• Accreditation Program Officer sends museum list of potential Peer Reviewers. Within one week, museum tells Program Officer if any reviewers pose conflict of interest.</li> <li>• Program Officer secures two of the reviewers on the list to serve as the Visiting Committee.</li> <li>• The museum and Visiting Committee select specific visit dates within the pre-assigned six-week window.</li> <li>• Museum prepares for site visit.</li> <li>• Visit occurs.</li> <li>• Visiting Committee writes and submits report to Accreditation Commission.</li> <li>• Museum placed on pre-assigned Commission meeting agenda.</li> </ul>	<b>2-4</b>	<b>10-12</b>
<b>ACCREDITATION COMMISSION REVIEW &amp; DECISION</b> <ul style="list-style-type: none"> <li>• Accreditation Commission reviews Self-Study and Visiting Committee report.</li> <li>• Commission grants accreditation, denies accreditation, or tables its decision for one year so museum can address specific concerns.</li> <li>• Museum receives Commission decision letter and a copy of the Visiting Committee report.</li> <li>• When accreditation is granted, the next Self-Study due date is stated in the decision letter. Accreditation is usually granted for 10 years; in select cases the Commission may designate a shorter award period.</li> </ul>	<b>1-4</b>	<b>11-16</b>

\*Times given are approximate and do not factor in additional time the museum must take to remedy incomplete items throughout the process or tabling actions by the Commission at final decision stage.