

Accreditation Site Visit Report Form

Institution	
Visit Start Date	
Peer Reviewers	
Report Due Date	

Accreditation Site Visit Report Form

Site Visit Philosophy

The primary purpose of the site visit is to verify information in the Self-Study and gather new data. The visit should be driven by the opportunities unique to the site visit, to see what the Self-Study cannot capture: the facility, operations and intangibles such as the museum's culture. The visit helps Peer Reviewers understand issues through discussions with the staff, governing body, volunteers and others associated with the museum.

Initial accreditation reviews and reaccreditation reviews are fundamentally different in scope:

- Initial reviews are comprehensive and evaluate all aspects of the museum's operations
- Reaccreditation reviews have elements of verification but are largely focused on critical issues, problem areas, areas of greatest risk or threat and recent/upcoming change as identified in the Self-Study

Both types of visits take an overall look at the museum's trajectory and capacity to fulfill its mission. Indicators to consider include the museum's finances, strategic plan, community support and relationships.

The Role of the Site Visit Report Form

This form serves as a tool for the Visiting Committee to easily appraise the operations of a museum, particularly its adherence to the Core Standards (Characteristics of Excellence for U.S. Museums). It ensures that all museums are assessed using the same criteria and that the Accreditation Commission is provided with a thorough analysis of all areas of a museum's operations so they can make an objective and well-informed decision.

Use this form to guide your site visit and to note any examples of the museum exceeding or failing to meet the Core Standards (Characteristics of Excellence). The Concluding Narrative gives you an opportunity to use your experience and expertise to summarize the institution's strengths and weaknesses.

Instructions for this Form

1. Read the Site Visit Report Form

Review the questions, activities, and expectations outlined in the Site Visit Report Form. Some activities require minimal pre-visit action or research. Contact Accreditation Program staff with any questions or concerns **before** conducting your site visit.

2. Read the museum's current Self-Study and previous Visiting Committee report and Accreditation Commission decision letter

Use these materials to familiarize yourself with the museum and prepare to complete this form.

3. Read the Special Instructions for This Site Visit

Be sure to address these items and comment on their status.

4. Complete all activities in each section and address any concerns in the Overall Summary

Use the activities to guide your visit to the museum and your interactions with its staff, volunteers and governing authority members.

5. Answer any section-specific Questions

For each question, check “Yes” or “No.” Use the Overall Summary at the end of the section for further comment if needed.

6. Indicate if the museum meets each Core Standard (Characteristic)

For each standard, check “Yes” or “No.” If you check “No” explain your rating in the Overall Summary at the end of the section.

Yes means the museum meets the Core Standard (Characteristic). The museum’s practices are appropriate for its circumstances and allow the museum to achieve the outcome stated in the standard.

- You may still check “Yes” if you think the museum’s practices are outside the norm but:
 - Are effective and appropriate for this museum
 - Do not threaten the collections or the museum’s ability to fulfill its mission, public service and educational roles
 - In the Overall Summary, use the Minor Concerns category to note specific practices that seem outside the norm

No means the museum falls short of meeting the Core Standard (Characteristic). The museum’s practices prevent it from achieving the outcome stated in the standard.

7. Use the Overall Summary at the end of each section to support or supplement your answers in Activities, Questions or Core Standards (Characteristics of Excellence).

Use the following guidelines:

An Exemplary Practice is:

- A unique or creative solution to an issue facing the museum
- An action that took the museum to a new level of professionalism or provides a model that other museums may want to adopt

A Minor Concern is:

- A practice, policy, plan or situation that could be improved for the overall benefit of the museum but:
 - does not detract from the museum’s ability to operate legally and ethically
 - does not require immediate remediation
- A condition that in the future may impede the museum’s ability to fulfill its mission or serve its community but does not pose an immediate threat and is being (or can be) corrected

A Major Concern is:

- A practice, condition or culture that:
 - poses an immediate hazard to people or collections
 - threatens the collections or the museum's ability to fulfill its mission, public service or educational roles
 - clearly violates AAM's Code of Ethics for Museums or other relevant discipline-specific professional standards
 - could undermine the museum's public trust, or the museum field as a whole, if it was widely known

8. Write Your Concluding Narrative

Use the guidelines provided and embed your narrative directly in this form. Generally, the Concluding Narrative should be two to four pages. It may be longer if the conditions at the museum warrant it. Keep in mind that the Concluding Narrative will be shared with the museum.

9. Complete the Confidential Advisory Comments for the Accreditation Commission

Advisory Comments are a confidential communication to the Commission and will not be shared with the museum. Use the guidelines provided and embed your comments directly in this form.

10. Submit the typed, completed Site Visit Report Form to Accreditation Program Staff

Reports are due three weeks after the site visit. Do not send a copy to the museum. Program staff will review it before sending it to the Accreditation Commission. The report is forwarded to the museum with the Commission's decision letter.

Special Instructions for this Site Visit

The Accreditation staff has flagged the items below for review by the Visiting Committee while on site. Please indicate whether the issue has been resolved and comment on how it was or is being addressed.

Issue: [merge from Aptify]

This issue: Resolved
 Active

Comments:

Issue: [merge from Aptify]

This issue: Resolved
 Active

Comments:

Issue: [merge from Aptify]

This issue: Resolved
 Active

Comments:

Collections Stewardship Role

Activities

Describe any concerns in the Overall Summary at the end of this section.

1. Visually inspect all areas where collections are stored (including offsite locations), exhibited or treated (conservation, preparation areas, etc.). Look for pests, leaks, inappropriate materials/housing or other circumstances that put collections at risk.

Mark if *not* acceptable:

- Collections Storage (onsite)
- Collections Storage (offsite)
- Exhibition areas
- Treatment areas

2. Observe the museum’s environmental conditions and equipment as well as procedures for monitoring those conditions. Ask collections and/or facility management staff:

- How often are areas monitored? How? By whom?
- Show me some recent readings for various spaces.
- Do you have any current challenges in providing a stable environment for collections? How are they being addressed?

3. Look at documents used in the management and care of collections, including:

- Deeds of gift
- Incoming and outgoing loan agreements
- Physical and digital catalog records
- Conservation policies and plans
- Lending policies and agreements with non-museum entities (if applicable)

Questions		
	YES	NO
Are environmental conditions appropriate for the collections?		
Are environmental conditions adequately monitored?		
Are temperature and humidity levels within acceptable limits?		
Are measures in place to mitigate significant climate fluctuations?		
Are collections adequately documented?		
Are collections adequately secured?		
Are collections on exhibition, in storage, on loan and in transit adequately protected?		

Core Standards (Characteristics of Excellence)		
	YES	NO
The museum owns, exhibits or uses collections that are appropriate to its mission.		
The museum legally, ethically and effectively manages, documents, cares for and uses the collections.		
The museum's collections-related research is conducted according to appropriate scholarly standards.		
The museum strategically plans for the use and development of its collections.		
Guided by its mission, the museum provides public access to its collections while ensuring their preservation.		

Overall Summary: Collection Stewardship Role

Major Concerns:

Minor Concerns:

Exemplary Practices:

If the museum noted any areas of change in the Self-Study, comment on how well the museum has handled them or is preparing for them.

Organizational Health

Activities

Describe any concerns in the Overall Summary at the end of this section.

1. Visually inspect all spaces used by the general public and the staff, as well as those that are unoccupied. Look for any potential risks to the facility or the people who use it. Look for signs that the facility is anything other than clean, safe and well-maintained.

Mark if *not* acceptable:

- Public areas (indoor and outdoor)
- Office areas
- Other non-public areas (indoor and outdoor)

2. Observe the relationships between staff and the governing authority. Learn what staff members, volunteers and governing authority representatives think about the institutional culture, staff morale and the ability of the institution to meet the needs of its stakeholders with the resources available.

Questions		
	YES	NO
Do the knowledge, skills and abilities of the museum's governing authority enable the group to effectively govern the museum?		
Is there a real, practical delegation of authority from the governing authority to the director?		
Does everyone understand the organizational structure?		
Are the workplace dynamics healthy?		
Is the museum living within its means?		
Do the museum's facilities meet the needs of its staff as well as its visitors?		
Does the decision-making structure accommodate change from the bottom up as well as from the top down?		

Core Standards (Characteristics of Excellence)		
	YES	NO
The governance, staff and volunteer structures and processes effectively advance the museum's mission.		
The governing authority, staff and volunteers have a clear and shared understanding of their roles and responsibilities.		
The governing authority, staff and volunteers legally, ethically and effectively carry out their responsibilities.		

The composition, qualifications and diversity of the museum’s leadership, staff and volunteers enable it to carry out the museum’s mission and goals.		
There is 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.		
The museum legally, ethically and responsibly acquires, manages and allocates its financial resources in a way that advances its mission.		
The museum operates in a fiscally responsible manner that promotes its long-term sustainability.		
The museum allocates its space and uses its facilities to meet the needs of the collections, audience and staff.		
The museum has appropriate measures to ensure the safety and security of people, its collections and/or objects and the facilities it owns or uses.		
The museum has an effective program for the care and long-term maintenance of its facilities.		
The museum is clean and well-maintained, and provides for the visitors’ needs.		
The museum takes appropriate measures to protect itself against potential risk and loss.		
The museum complies with local, state and federal laws, codes and regulations applicable to its facilities, operations and administration.		

Overall Summary: Organizational Health

Major Concerns:

Minor Concerns:

Exemplary Practices:

If the museum noted any areas of change in the Self-Study, comment on how well the museum has handled them or is preparing for them.

Educational Role

Activities

Describe any concerns in the Overall Summary at the end of this section.

1. Look at the museum's website. Pay particular attention to how the museum is using the internet to deliver content and share information about its educational activities and resources.

2. If possible, observe a program, tour or other educational activity in progress. Does the staff member or volunteer conducting the program appear informed and trained? Is the content appropriate to the museum's mission?

3. Examine all the interpretive materials or equipment in the exhibition spaces (e.g., gallery guides, wall text, labels, videos, audio guides, interactives, etc.).

Questions		
	YES	NO
Are the interpretive materials accurate, informed and professionally presented?		
Are the interpretive materials and equipment appropriate and accessible to different audiences?		
Is the museum's educational programming developed in accordance with and presented with clear ties to educational standards and curricula?		
Does the museum actively, consistently evaluate interpretive programming and educational content?		

Core Standards (Characteristics of Excellence)		
	YES	NO
The museum clearly states its overall educational goals, philosophy and messages, and demonstrates that its activities are in alignment with them.		
The museum understands the characteristics and needs of its existing and potential audiences and uses this understanding to inform its interpretation.		
The museum's interpretive content is based on appropriate research.		
Museums conducting primary research do so according to scholarly standards.		
The museum uses techniques, technologies and methods appropriate to its educational goals, content, audiences and resources.		
The museum presents accurate and appropriate content for each of its audiences.		
The museum demonstrates consistent high quality in its interpretive activities.		
The museum assesses the effectiveness of its interpretive activities and uses those results to plan and improve its activities.		
The museum demonstrates a commitment to providing the public with physical and intellectual access to the museum and its resources.		

Overall Summary: Educational Role

Major Concerns:

Minor Concerns:

Exemplary Practices:

If the museum noted any areas of change in the Self-Study, comment on how well the museum has handled them or is preparing for them.

Planning

Activities

Describe any concerns in the Overall Summary at the end of this section.

1. Ask the staff, volunteers and governing authority representatives for their perspectives on the museum's strategic planning process. Do they feel involved in planning for the museum's future? Are they familiar with the contents of the museum's current strategic plan?
2. Ask at least one staff member, one volunteer and one board member what the mission of the museum is (verbatim or in spirit) and how it connects to their work. Can they explain the mission and the effect it has on the museum's day-to-day operations?

Questions		
	YES	NO
Do the staff and board agree on the museum's vision and strategic goals and how it is going to achieve them?		
Is there a culture of institutional planning, self-reflection and continual improvement?		
Are staff, volunteers, board members and the community involved in strategic planning in some way?		
Is the plan being followed? Does the reality of what's happening at the museum generally match the institutional planning documents?		
Is the plan guiding decisions?		
Does the leadership actively gauge progress on the plan and make adjustments?		

Core Standards (Characteristics of Excellence)		
	YES	NO
The museum has a clear understanding of its mission and communicates why it exists and who benefits as a result of its efforts.		
All aspects of the museum's operations are integrated and focused on meeting its mission.		
The museum's governing authority and staff think and act strategically to acquire, develop and allocate resources to advance the mission of the museum.		
The museum engages in ongoing and reflective institutional planning that includes involvement of its audiences and community.		
The museum establishes measures of success and uses them to evaluate and adjust its activities.		

Overall Summary: Planning

Major Concerns:

Minor Concerns:

Exemplary Practices:

If the museum noted any areas of change in the Self-Study, comment on how well the museum has handled them or is preparing for them.

Public Service Role

Activities

Describe any concerns in the Overall Summary at the end of this section.

Prior to the site visit:

1. Review the museum's online presence:
 - Google it and review the results.
 - Look at its presence on social media sites like Facebook and Twitter.
 - Read online reviews of it on sites like Trip Advisor and Yelp.
 - Get a feel for the museum's culture, voice and persona. Notice how people talk about the museum in the community at large.

2. Using their programming and online presence as your guide, note your perception of the museum's self-identified communities.

During the site visit:

1. If the museum has a visitor comment book, read what people have written.

2. Talk to community members, either formally or informally, to get their impressions of the museum. Use your interactions with hotel staff members, taxi drivers, food service personnel and other local residents to gather their impressions of the museum.

Questions		
	YES	NO
Does the museum encourage and facilitate community dialogue about the programs and services it offers?		
Is a drive for diversity evident in the composition of the staff, visitors and board?		
Is a commitment to physical accessibility apparent throughout all facilities and programming?		
Does the community demonstrate an awareness of and investment in the museum, its mission and its collections?		
Did you see evidence that the community values and supports the museum, and sees it as a trusted resource?		
Is the museum meaningfully engaged with its professional and cultural communities?		

Core Standards (Characteristics of Excellence)		
	YES	NO
The museum is a good steward of its resources held in the public trust.		
The museum identifies the communities it serves, and makes appropriate decisions in how it serves them.		
Regardless of its self-identified communities, the museum strives to be a good neighbor in its geographic area.		
The museum strives to be inclusive and offers opportunities for diverse participation.		
The museum asserts its public service role and places education at the center of that role.		
The museum demonstrates a commitment to providing the public with physical and intellectual access to the museum and its resources.		
The museum is committed to public accountability and is transparent in its mission and its operations.		

Overall Summary: Public Service

Major Concerns:

Minor Concerns:

Exemplary Practices:

If the museum noted any areas of change in the Self-Study, comment on how well the museum has handled them or is preparing for them.

Concluding Narrative

Summarize your overall impression of the museum. Does it have the capacity, leadership and organizational culture and structure to:

- continue to address any challenges that exist
- fulfill its goals
- meet its educational mission
- serve its public
- care for its collections
- be a viable, sustainable organization for the foreseeable future

Think about its impact on its community (self-defined or geographic), local education system, visitors (both physical and virtual) and the museum field as a whole.

Summarize the museum's greatest strengths and weaknesses and provide any other comments you want to share with the museum that are not captured in the Site Visit Report Form.

If this is a reaccreditation review:

- Has the museum addressed any issues cited by the Accreditation Commission in its previous decision letter?
- If you have not already done so, comment on any areas of change noted in the Self-Study and how well the museum has handled them or is preparing for them.
- Has the museum progressed or evolved as you would expect since the last review? How?

Confidential Advisory Comments for the Accreditation Commission

THIS SECTION WILL NOT BE GIVEN TO THE MUSEUM

Visiting Committee Advisory Comments are:

- Candid assessments of the museum's overall professionalism, capacity and sustainability
- Things you want the Commission to know but did not want to include in the report
- Positive or negative points from the report that you particularly want to emphasize
- Critically important to the Accreditation Commission to inform its decision-making
- Brief

Things to think about:

Would you hold this up as a model for other museums? Why or why not?

Think about the museum from the perspective of its various stakeholder groups:

If you were a significant donor, how likely would you be to donate funds to this museum?

If you were a prospective job applicant, would you want to work here?

If you were an elementary school teacher, how likely would you be to take a class on a fieldtrip to this museum?

If the museum were to close today and never reopen would anyone care?

Is there anything else that was not captured in the Site Visit Report Form that you feel is essential for the Accreditation Commission to know?