

What You Need to Know About: The Accreditation Site Visit As a Visiting Committee Member

When will the visit occur? Can I request a specific visit date?

To keep the museum's review on schedule your site visit must occur within the prescribed timeframe, which is based on their Self-Study submission date. Once you have agreed to serve on a Visiting Committee, you will negotiate specific dates with the museum and the other member(s) of your Visiting Committee team.

Self-Study Submitted	Site Visit
Jan. 15 or March 1	July 15 - August 30
May 15 or July 1	November 1 - December 15
Sept. 15 or November 1	March 1 - April 15

How long is the visit?

Typically, a visit lasts two full days. The length of the site visit depends on the size and complexity of the museum and its governing structure. Large museums, those with multiple sites or those with multiple supporting groups or advisory boards may require a longer site visit.

What are the costs related to the visit? Who pays?

All of the costs associated with the visit are ultimately the responsibility of the museum. In most cases, Visiting Committee members cover their own expenses and are reimbursed by the Alliance after the visit. The museum is then invoiced for these expenses. Covered expenses include: coach class air or rail fare, rental car, mileage for private vehicles, parking, taxis, hotel accommodation, meals en route and during the visit and other miscellaneous travel costs. See the Travel Reimbursement Form for the list of non-allowed expenses.

Who makes the Visiting Committee's travel arrangements?

Visiting Committee members generally arrange and pay for their own transportation and lodging and then submit their expenses to the Accreditation staff using the Travel Reimbursement Form. Asking the museum for lodging recommendations or other specific information is encouraged and some museums may offer to arrange direct billing and/or discount rates at a hotel with which they have an account.

When will the Visiting Committee members be reimbursed?

The Visiting Committee members may submit their expenses to the Accreditation staff as soon as they are incurred. The staff will process them as promptly as possible. Visiting Committee members will receive reimbursement directly from the Alliance, which will then invoice the museum.

What if the director leaves before the site visit occurs?

A site visit can occur in the absence of a permanent director, as the review is about the museum, not its leader. The museum is expected to have an acting or new leader to take responsibility for overseeing and participating in the site visit. If the museum experiences a leadership transition, they will notify the Accreditation Program staff, who will then inform the Visiting Committee.

What if a Visiting Committee member or museum director can no longer make the agreed upon visit date?

If unforeseen circumstances, such as serious illness, family emergencies or weather events, interfere with the availability of a Visiting Committee member or the director for a scheduled site visit, that person should contact the Accreditation staff as soon as possible. They will work with the Visiting Committee and the museum to come to the best solution for all parties. That may be a substitute Visiting Committee member, a single Visiting Committee member onsite or a rescheduled visit.

How should the Visiting Committee prepare for the site visit?

Review the information available on the Alliance's website at <http://www.aam-us.org/resources/assessment-programs/peer-review/accreditation-peer-reviewer-resources> to ensure that you understand your role as a reviewer and are familiar with the entire accreditation process. Read the documents sent to you by the Accreditation staff, which will include the museum's Self-Study and its attachments as well as the Site Visit Report Form. Pay special attention to the list of items flagged for onsite review by the staff, as you should be sure to address them in your report. If this is a reaccreditation site visit, review the museum's previous decision letter and Visiting Committee report and note any issues that the Accreditation Commission asked the museum to address before their next review.

Who sets the agenda for the site visit? What should be included?

We encourage the Visiting Committee to initiate the discussion but setting the agenda is a collaboration between the Visiting Committee and the museum. Generally, it should include:

- Initial interview with the director
- Tour of the entire facility (including galleries and other public spaces; program departments, offices, work areas; collections areas, including storage and records; workshops, meeting rooms and laboratories; grounds; off-site collections storage areas; and satellite sites)
- Meetings with key staff members
- Meeting with some or all of the governing authority members
- Group meeting with all of the staff (can split into multiple groups if the staff is very large)
- Time for Visiting Committee members to discuss your findings
- Follow-up interviews, if necessary
- Exit interview with the director
- Final meeting between the Visiting Committee members

What standards should I use to evaluate the museum?

The standards for accreditation are *The Characteristics of Excellence for U.S. Museums*, the *Two Core Questions*, and the *National Standards and Best Practices for U.S. Museums*. They are all available online at <http://www.aam-us.org/resources/ethics-standards-and-best-practices/characteristics-of-excellence-for-u-s-museums>.

Can I give the museum advice if they ask for it?

The Accreditation site visit is not consultative; instead, it is an impartial review of the museum's operations. Visiting Committee members should not provide specific recommendations on how to improve operations or rectify problems. It is understandable, however, that the museum may want to take advantage of your expertise while you are on site. If you are comfortable doing so, you may provide advice orally during informal contact, with a clear understanding that this unwritten communication is only advice from a peer and not officially sanctioned by the Accreditation Commission or AAM.

Can I contact the museum after the visit for more information?

If you have follow-up questions while completing the Site Visit Report Form, it is perfectly acceptable to get in touch with the museum. If they ask what your recommendation to the Accreditation Commission is going to be, remind them that you are not permitted to divulge that information.

What materials do I submit to the Accreditation Program staff? When are they due?

After the site visit, the Visiting Committee members have three weeks to collaboratively complete the Site Visit Report Form and submit it to the Accreditation staff. DO NOT send a copy to the museum. The staff will review it and submit it to the Accreditation Commission. The museum will receive a copy with the letter notifying them of the Commission's decision.

When will the Accreditation Commission review my report?

The Commission meets three times a year: February, June and October. Museums are reviewed based on the date their site visit occurred. You will receive an email notifying you that the museum you reviewed is on the agenda.

Site Visit	Commission Review
March 1 - April 15	June
July 15 - August 30	October
November 1 - December 15	February

After the Commission assesses the museum you visited, you will receive a copy of the Commission's official decision letter. Upon receipt, please destroy any remaining materials you have from the visit and remember to maintain the confidentiality of the decision and the museum's information.

Accreditation Site Visit Responsibilities

Responsibilities of the Museum

For an effective site visit, the museum should:

- Work in collaboration with the Visiting Committee to develop a comprehensive and realistic agenda
- Voice and negotiate expectations early on to avoid any possibility of misinterpretation
- Provide additional materials upon request in a timely manner
- Make sure key staff and governing authority members are available for the visit and provide access to all facilities as requested
- Follow the set agenda onsite and negotiate any changes with the peer reviewers to make sure that the changes meet both parties' needs
- Respect the time, knowledge and experience of the peer reviewers
- Provide open and candid responses to questions from peer reviewers

When arranging travel, the museum should:

- Ensure safe, clean and reasonably priced accommodations
- Provide for accommodations in a commercial establishment. Lodging in private homes is inappropriate, unless no other option is geographically feasible
- Provide private space and time for the peer reviewers to gather their thoughts, prepare for the next day and capture events in their notes
- Provide reliable transportation for all parts of the visit
- Provide reasonable meal options during the visit, with attention to any communicated special needs
- Tell the peer reviewers about any restrictions the institution has regarding reimbursements for travel expenses—meals, mileage, lodging, etc.

Responsibilities of the Peer Reviewer

For an effective site visit, the peer reviewer should:

- Maintain a professional demeanor in any interaction with the museum's staff and governing authority. Peer reviewers represent AAM in an official capacity and must conduct themselves accordingly in all business and informal situations
- Collaborate with the museum to develop a comprehensive and realistic agenda
- Voice and negotiate expectations early on to avoid any possibility of misinterpretation

- Thoroughly prepare for the visit, including reading all self-study materials and requesting and reviewing any additional materials needed
- Respect the time, knowledge and experience of the staff, governing authority, community representatives and all others involved in the site visit
- Follow the set agenda onsite and negotiate any changes with the museum to ensure that the changes meet both parties' needs. Be prepared for glitches and respond to them graciously and creatively
- Ask thoughtful questions, gather information and listen carefully
- Remain diplomatic, fair, objective and empathetic. Respect any and all shared confidences
- Clarify and maintain the appropriate, non-consultative role for the visit
- Before departing, review any necessary follow up and provide contact information should there be additional questions or concerns
- Remain aware of the impact of his/her position of influence as a reviewer and the importance of maintaining the integrity and credibility of the process, and not jeopardize it by accepting any gratuities or gifts of any substantive value from the host institution or their representatives

When arranging travel, the peer reviewer should:

- Be considerate of the museum's resources throughout the visit, including travel costs, meals, accommodations and transportation. The peer reviewer is in a position of influence and should not take advantage by incurring unreasonable expenses.
- Tell the museum if any of their suggestions are not reasonable, acceptable or appropriate
- Communicate any special needs to the museum (e.g. dietary restrictions, disability concerns, health issues)
- Schedule private time and space during the visit. Meals or receptions as part of a visit can be an effective use of time but a peer reviewer is not obligated to accept such engagements if s/he does not feel comfortable with the situation or it does not seem appropriate
- Expect to pay personally for any costs associated with accompanying guests or extending the visit for personal or other business reasons
- Submit a reimbursement request for all reasonable and documented costs associated with the visit and expect a timely response