

What You Need to Know About: The Accreditation Site Visit At Your Museum

Who will be on the Visiting Committee?

Your Visiting Committee will be two (or three, for very large museums or museum systems) directors of accredited museums or senior staff members with direct experience with the accreditation process. They will be vetted members of the Alliance Peer Review roster and come from the names on your potential Peer Reviewer list.

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

To keep the museum's review on schedule the site visit must occur within the prescribed timeframe, which is based on your Self-Study submission date. Once your Visiting Committee has been confirmed, you will receive their contact information and be able to discuss specific dates with them.

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 appropriate 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. We suggest museums budget \$1700-\$2400 to cover both Peer Reviewers' 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. They may ask you for suggestions for lodging or other travel specifics. It is perfectly acceptable for you to arrange direct billing or discount rates at a hotel with which you have an account. This lessens the reviewers' out-of-pocket expenses and you will not be invoiced for the charges later.

How and when will the museum be billed for the site visit expenses?

Each member of the Visiting Committee will submit a Travel Reimbursement Form to the Alliance. The Alliance reimburses the individual directly and then invoices the museum. This procedure allows the Alliance to expedite reimbursement and arbitrate any unusual expenses. The Accreditation staff generates invoices at the end of each month. The museum may receive separate invoices for each reviewer's expenses. You should respond to the invoice promptly and not attempt to wait until your accreditation decision is received.

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 should notify the Accreditation Program staff as soon as possible. The staff will then inform the Visiting Committee.

What if a Visiting Committee member or the 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 members 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.

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, the agenda 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 their findings
- Follow-up interviews, if necessary
- Exit interview with the director
- Final meeting between the Visiting Committee members

How should the museum prepare for the site visit?

To avoid frustration for both you and the Visiting Committee members, read the information about the accreditation process on the Alliance's website (<http://www.aam-us.org/resources/assessment-programs/accreditation/process-and-timeline>) and thoroughly orient staff, volunteers and governing authority members about what to expect during the site

visit. Make sure that everyone who needs to be familiar with the museum's Self-Study materials and previous decision letter and Visiting Committee report (if this is a reaccreditation) reviews them and is ready to answer the Visiting Committee's questions.

What standards will the Visiting Committee 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 ask the Visiting Committee members for advice?

The Accreditation site visit is not consultative. Instead, it is an impartial review of the museum's operations. Visiting Committee members are not supposed to provide specific recommendations on how to improve operations or rectify problems. It is understandable, however, that you may want to take advantage of their expertise while they are on site. If the Visiting Committee members are comfortable doing so, they 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 Visiting Committee members after the visit to give them additional information?

Yes, you can and should contact them if you have any additional materials you feel would be helpful. They may also contact you with follow-up questions as they compile their report. You should not, however, contact them to ask what they will be including in the report or recommending to the Accreditation Commission.

When will the Visiting Committee turn in their report? When will I receive a copy?

The Visiting Committee will submit their report to the Accreditation Program staff three weeks after the site visit. The staff will review the report, follow up with the museum or Visiting Committee if clarification is needed and then submit the report to the Accreditation Commission in advance of their next scheduled meeting. A copy of the report will be sent to the museum with the decision letter from the Commission, approximately one month after the Commission meets.

The museum does not get to review the report prior to the Commission meeting but does have the opportunity to respond to it, if necessary, after the Commission's review. If there are serious *factual* errors in the report, the museum may submit written clarification to be appended to the report in the museum's permanent file. If the Commission tables the museum due to serious concerns which are supported by the report, the museum will have the opportunity to directly explain and act on these issues as part of the one-year tabling process.

When will the Accreditation Commission review my museum's report?

The Commission meets three times a year: February, June and October. Your museum will be reviewed based on the date of your site visit.

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

Prior to the meeting, you will receive an e-mail from the Accreditation staff notifying you that your museum is on the agenda. You will also receive *Frequently Asked Questions About: Being Reviewed by the Accreditation Commission*.

What are the Accreditation Commission’s options for making decisions?

The Accreditation Commission can decide to accredit, deny or table a museum, or to defer their decision. Deferral simply gives the Commission time to collect additional information. Tabling provides the museum with one year to address the issues that the Commission feels are holding it back from being an accreditable institution. If the Commission thinks that the museum has more issues than it can reasonably address in one year it will encourage the museum to withdraw from the program and reapply in the future. Museums that are denied accreditation must wait one year to reapply.

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 not appropriate, 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