

CAP Agreement

Once the museum has selected you as its assessor, you must draw up an agreement for the assessment. A sample may be found in Appendix B (page 29); or downloaded from Heritage Preservations Web site at www.heritagepreservation.org/CAP.

Assessors and museums are strongly encouraged to use the sample we provide. If the assessor or museum writes its own agreement, it must contain the following information:

- total cost of the assessment (including what is and is not included in your professional fees)
- total of travel, meals, and lodging expenses
- who will make travel and lodging arrangements (either you or the museum)
- dates for the assessment (**the site visit must be after January 1 of the program year**)
- dates for the rough draft and final report (Heritage Preservation recommends the rough draft be due within eight weeks after the site visit. It is part of an assessor's ethical obligation to honor these dates and to acknowledge up front if he/she cannot fulfill obligations in the proposed time frame.)
- any additional expenses, such as telephone calls, duplicating, and postage.

The following statements must also be included in the agreement:

- “The Assessor’s work on this project will be considered work for hire, and the report and related materials, including verbal, e-mail and other communications, produced shall be deemed to be the property of the institution.”
- “It is understood and agreed that Heritage Preservation’s sole responsibility is to administer the museum’s participation in this technical assistance program and the parties agree that Heritage Preservation assumes no additional responsibility or liability, unless it is expressly stated in writing by an authorized representative of Heritage Preservation.”
- “The schedule must include a site visit date after January 1. All CAP activities must be completed by November 1 of the program year. Plan accordingly to allow sufficient time

for the museum to review the draft report, for the assessor to make changes, and for the museum to approve the final report and submit it to Heritage Preservation before November 1. NOTE: Failure of the assessor to complete work by November 1 of the program year will result in a reduction of professional fees by 5% per week that the report is late, not to exceed 25%, unless at the sole discretion of Heritage Preservation it is determined there is good and sufficient cause.”

Once Heritage Preservation receives the CAP materials, a representative will sign the agreement and send both the museum and assessor a copy. Heritage Preservation does not require original signatures.

Site Visit Dates

The site visit may not take place before

January 1 of the program year. Before the site visit may occur, the agreement(s) must be approved and signed by Heritage Preservation. Program activities, including receipt of the final report, must be completed by **November 1** of the program year.



TIP: For museums that receive collections and historic structure assessors, we strongly recommend that both be on site together for at least one day. Since the care of buildings and collections is interrelated, this collaboration is vital to the assessment’s success. If it is not possible for both assessors to be on site for at least one day, please ask the museum or Heritage Preservation for contact information so you and the other assessor may communicate during the CAP process.

Budget Details

Since CAP is a technical assistance program rather than a grant program, no money will be given to the museum. Therefore, the payment/reimbursement process will depend on the details agreed upon by the museum and assessor.

Below are a few example scenarios.

Allocation Amount: \$3,390

- *Example 1:* The assessor fee is \$3,300, and travel/lodging/meals are \$90 and arranged by the assessor.
Heritage Preservation will reimburse the assessor for travel costs after receiving receipts and will pay the assessor for the professional fee after receiving a copy of the final report and assessor's invoice.
- *Example 2:* The assessor fee is \$3,300, and the travel/ lodging/meals are \$165 and arranged by the museum.
Heritage Preservation will pay the assessor's professional fees after receiving a copy of the final report and assessor's invoice. Heritage Preservation will also reimburse the museum \$90 for the assessor's travel after receiving receipts. The museum will be responsible for the remaining balance.

- *Example 3:* The assessor fee is \$3,850 and travel/lodging/meals are \$165 and arranged by the assessor.

Heritage Preservation will invoice the museum for \$460 to cover the assessor's professional fee. Heritage Preservation will pay the assessor's professional fees after receiving a copy of the final report and assessor's invoice. The museum will be responsible for the travel costs and will reimburse the assessor directly.

For questions regarding the budget details or your payment, contact the CAP staff at cap@heritagepreservation.org or 202-233-0800.



TIP: Please remember to keep your receipts for all CAP-related travel, lodging, and meals. After completing the site visit, assessors may submit receipts for travel, lodging, and meals to the museum or Heritage Preservation for reimbursement, per the arrangements outlined in the agreement.