

# The CAP Report

The CAP report contains information and observations about the findings during the site visit, as well as recommendations for improving collections care. The report is a very important document for a CAPped museum – in most cases, it serves as the foundation for a long-range conservation strategy and helps with fund-raising efforts or provides justification for the reallocation of resources within an institution.

There is no formal standard to follow when writing a CAP report. However, each report should contain the following information:

- an **executive summary** that discusses the issues and priorities of the institution
- a **topical summary** that goes into greater detail about various issues
- a **list of recommendations** that includes a plan of action organized as short-, medium-, and long-term goals
- and **appendices and photos** that support findings and recommendations

The **executive summary** is no more than one or two pages in length and should succinctly summarize the important issues raised in the assessment report. It should clearly outline the institution's pressing needs and thus make the case to a board of trustees and potential funders for improving collections care within the institution.

Though some standard conservation information will be woven into the **topical summary**, the report should be customized for each institution and take into consideration the overall resources of the museum. In addition, the assessor needs to carefully consider the audience for the report and write it accordingly, clarifying technical terms and language. Readers may range from a volunteer board to a county government agency or professional museum staff.

**Recommendations** should be presented in a logical form, with an ordering by priority that will allow the institution to develop a long-range plan. The rationale for the ordering of priorities also must be evident, as the report will be used to document needs to funding agencies.

There are several approaches to summarizing recommendations. Some institution directors have expressed the desire to have the recommendations listed simply in priority order. Others have said they prefer to have the list organized into changes that can be handled with current resources and staff versus goals that require fund-raising. In the latter case, it is also important to have items prioritized within the two lists. How the recommendations are listed in the report should be decided together by the museum and the assessor.

## CAP Report Topics

Each assessor has an individual style of report writing, varying from outline to narrative. Some assessors keep the text of the report quite short and append additional explanatory material in the form of reprints of articles and product data. Others may provide more detailed information within the report text. Regardless of the style, an assessment report should provide information on the following topics:

- general information about the institution and the goals of the assessment
- staffing and staff training needs
- condition of the building and facilities (this will be more extensive if a historic structure assessor is included in the project)
- climate control and environment (temperature, relative humidity, pollutants, particulates, light levels, pest control)
- the collections and their conditions, as well as the policies governing their care
- the conditions within exhibitions and in storage areas
- institutional emergency preparedness plans.

See Appendix D (page 59) for more information.

**Please keep in mind when preparing the report that many museums will attach portions or the full report to funding applications and proposals. Such proposals may be sent to local foundations, a university, a municipality, or state or federal agencies. It is acceptable to highlight institutional priority collections in the report, as this may help to solidify grant application priorities.**

## Other Considerations

**The report should help a museum deal with the challenges it faces.** To write an effective report, an assessor needs to understand how an institution gets things done as well as why it doesn't get other things done. Seeking to understand the weak points of an institution is not an invitation to be critical. Rather, it allows an assessor to present recommendations accordingly to get them implemented. Understanding the politics and management at an institution will allow you to craft recommendations and projects that are achievable and appealing to motivate the staff.

**Make sure your report can be understood by future staff at the institution.** Your report should focus on the collections and historic structure in a way that will allow new staff to understand it. Include some information about the collections and historic significance of the building.

**Write the report using simple language.** Using technical terms or jargon will require a footnote or glossary of terms as an appendix.

Recognizing individuals will make them feel they are part of the process and the report. Present facts about the visit with acknowledgements and thanks in the introduction. Giving the client contacts for museums with similar issues and projects is another way to motivate the institution. Point out to the museum that there are many clever ways to accomplish recommendations and that it will be essential to talk with others.



**TIP:** Often reports for the smallest institutions are the most complex. Be sure to get names and details straight. Seemingly innocuous errors can undermine the professional quality of a report. They can frustrate readers and dissuade them from reading further to get the real substantive information.

**Photographs tell the story.** Captions convey information that can be quickly grasped. A photograph of the insects in stored textiles can drive home the point to a board member who may never look at

collections in storage. Take advantage of page layout software to weave images into the text of the report.

**The report should leave the museum well equipped to seek funding.** The tone of the report is important for in-house use as well as funders. Include as many positive things as possible; this will help make sure the entire report will be read. Be sure to include recommendations that can be accomplished with the museum's current staff and funding. This will help develop a sense of achievement that both inspires the staff to accomplish more and shows progress when they seek funding.

**For museums that receive both a conservator and historic structures assessor, coordinating your recommendations and coming to joint conclusions is key.** Your reports should be complementary; close consultation will help you craft recommendations that don't conflict. Conflicting reports will confuse the museum and lead to inaction. Be sure to share a draft with the other assessor before submitting the report to make sure recommendations have not changed from what was discussed on-site.

## Historic Structure Reports

Diagrammatic plans of the site and each floor level of the building (including basement and attic) should be included with the final report (see samples on pages 78-79). Also include outline drawings of building exterior and important interior elevations. Although photographs are an excellent method to record existing conditions, adding notes and comments directly to floor plans and elevation drawings is often a fast and efficient way of noting major problems or complicated conditions that cannot be easily described with words.

These plans are for the purpose of functional analysis and for the development of recommendations of more suitable uses for various museum spaces. These simple drawings should convey only enough detail for a clear understanding of spatial relationships. Professional line drawings are not required. Drawings may be prepared free-hand on small scale on graph paper, but should be reasonably accurate (See Appendix E, Historic Structure Guidelines on page 69). Floor plans should indicate walls, windows,

doors, stairs, and overall dimensions only. Identify rooms by a simple letter designation which will correspond with a key of space use developed on a separate sheet.

Photographic documentation of each building inspected should accompany the final report. Photographs should include complete views of each condition and defect being illustrated. Major issues should be recorded. There should also be photographic documentation of typical window and door types. Each photograph should be labeled with the building name, specific subject and the date of recording.