

# Preparing for the Site Visit

Once you've accepted the job, plan ahead to help make the best use of the time on site to ensure that you address critical issues. The more prepared you are when you arrive, the more productive and efficient you will be on site. Heritage Preservation asks each participating museum to complete a Site Questionnaire about the institution's policies, holdings and facilities and sends a copy to the assessor(s) before the site visit. This provides the assessor with a sense of the preservation issues that may need to be addressed.

You may also wish to contact the museum ahead of time for copies of administrative documents regarding the management of collections, previous consultation reports, and floor plans. Historic structures assessors might want to request blueprints and previous architectural reports. Below is a list of documents you may wish to review before your visit:

- mission statement\*
- names and positions of staff, key volunteers, and board members\*
- institutional history, brochures, etc.
- organizational charts
- institutional long-range plan
- collections management policy
- floor plans and photographs
- history of structure(s)
- facility report
- written plans for facility expansion (if applicable)
- emergency preparedness plan
- environmental monitoring records
- surveys and reports by other consultants (such as MAP assessments or other reports concerning care and management of collections; National Register nominations)
- list of current and forthcoming grant applications
- maintenance records

\*included with Site Questionnaire

The administrative documents can be revealing. Gathering this information before going on-site will provide a perspective on how collections care currently fits into the management of the site at large. Sometimes there are discrepancies between what is written and what is being done at the site. The CAP process can help bring these practices and policies in sync.



**TIP:** Don't forget to ask the museum if special arrangements need to be made to access certain parts of the building, such as a ladder to get on the roof. It's also a good idea to remind staff that you will need access to all parts of the building so they can be sure to unlock doors, locate keys, and secure any special equipment necessary.

## Key Personnel for the Assessment

Shortly before the date of the assessment, confirm all travel and lodging arrangements with the museum and discuss the agenda for the site visit. In addition, discuss the schedule for the site visit including which staff, volunteers, and key board members and other decision makers will participate. Stress to the museum that involving board members will invest them in developing and achieving long-term goals for the preservation of the collections and/or buildings.



**TIP:** If outside contractors handle certain aspects of the museum's maintenance, such as the HVAC system, you may want to make arrangements to meet with them. At government-owned institutions, it may be helpful to have a city or county representative on hand for the site visit. Even though they are not present at the site every day, these individuals may be key to accessing funding or permission to allow your recommendations to be implemented.