

CAP Responsibilities

	What Heritage Preservation Does	What Participating Museums Do	What Assessors Do
<i>Getting Started</i>	<ul style="list-style-type: none"> Determine the number and type of assessor and allocation amount for each institution. Provide museum with assessor lists and guidelines for choosing assessors and provide additional names as requested. Answer any questions from the institution about choosing assessors. Review Museum/Assessor Summary of Agreement and Budget (Form A). Sign agreement and send copies to museum and assessor. If applicable, send invoice for professional fees over allocation. Forward museum's completed site questionnaire to the assessor. 	<ul style="list-style-type: none"> Review Program Packet and interview assessors. Contact Heritage Preservation for more names or submit Form B (if necessary). Prepare assessment budget. Select assessor(s) and prepare agreement(s). Send copy of agreement, Form A, Form B (if necessary), and Site Questionnaire to Heritage Preservation by requested date. If applicable, pay the Heritage Preservation invoice. If applicable, make travel and lodging arrangements for the assessor(s). Set site visit agenda and coordinate staff for interviews with assessor(s). 	<ul style="list-style-type: none"> Interview museum to determine whether match is appropriate (page 8). Work with museum to prepare agreement (page 9). Make travel and lodging arrangements with museum (page 9). Before the site visit, request that the museum have specific documents on hand (page 11). Coordinate site visit activities with other assessor, if applicable (page 13). Identify staff members to interview during the site visit and ask museum to include them on the site visit agenda (page 11).
<i>During Site Visit</i>	N/A	<ul style="list-style-type: none"> Facilitate assessor's work on-site. 	<ul style="list-style-type: none"> Conduct general assessment (page 15)
<i>After Site Visit</i>	<ul style="list-style-type: none"> Answer any questions from the institution or assessor during the assessment process. Pay the assessor fee after receiving the final report. Send Closing Packet to participating museum. One year after museum completes CAP, send Outcome-Based Evaluation packet. Send resource packet to museum after receiving completed evaluation. 	<ul style="list-style-type: none"> If applicable, submit travel and lodging receipts to Heritage Preservation or pay assessor for travel expenses. Answer assessor's questions during report writing. Review the draft report and discuss changes or questions with the assessor. Approve final report. Send one copy of final report and assessor's invoice for fees to Heritage Preservation within 10 business days (unless agreement specifies otherwise). Receive Closing Packet and return program evaluation. (1 year after completing the program) Receive Outcome Based Evaluation packet. Return survey and receive resource packet. 	<ul style="list-style-type: none"> Submit receipts for travel and lodging expenses to museum or Heritage Preservation as applicable (page 10). Include a prioritized list of needs and an executive summary in assessment report (page 19). If applicable, coordinate report writing with other assessor (page 20). Send draft report to institution by the date outlined in the agreement. If institution has changes to draft report, edit as necessary (page 23). Send two copies of final report and copy of invoice for assessment fees to the institution by deadline in letter of agreement (page 23). E-mail CAP staff the date final report was submitted to museum (page 23). Notify Heritage Preservation if assessment fee is not received within four weeks of sending the final report to institution (page 23).