

The Site Visit

There are various ways to conduct the site visit. Each assessor has favored techniques, but even these can change depending on the circumstances encountered on site. Regardless, there are three core components of the site visit that should be constant with each assessment. They are the introductory discussion, the walk-through, and the exit discussion

Introductory Discussion

The introductory discussion generally includes a discussion of the museum's goals and expectations for CAP and how these fit into its mission and future goals.

Participants in the introductory discussion vary, although there should be at least one or two key staff members present. While it is not required, the assessor may also wish to include additional staff, board members, and volunteers. This involvement will help the institution become more invested in CAP and thereby create enthusiasm for implementing the report's suggestions. If you choose not to include board and staff in the introductory discussion or walk-through, be sure to include them in the exit discussion.

The introductory discussion is an important step in the CAP process because it sets the tone for the rest of the site visit. Undertaking CAP can be an overwhelming process for many museums, and CAP's success depends in part on creating an atmosphere where the staff feels comfortable expressing their concerns and questions. The assessor can help create this atmosphere by establishing a dialogue with staff during the discussion and by giving as much positive feedback as possible.



TIP: Time management is key. The assessor has a lot to accomplish in the two days on-site, and it can be easy to get caught up in conversation about the museum's history or challenges. You must be firm with staff to accomplish what needs to be done.



TIP: The introductory discussion is a good time for two assessors assigned to the same CAP to agree on the names associated with the building layout, in order to ensure consistency in the final report.

Walk-Through

The walk-through is a comprehensive tour of every room and space that holds collections and/or a roof-to-cellar tour of the museum buildings. It's a good idea to invite board, staff, and volunteers to participate. During the walk-through, listen and ask questions, but be sure to make positive comments to help put everyone at ease.

The walk-through is also a good time to introduce staff to some of the problems and corresponding technical terms that may appear in the final report. It's easier for the staff to fully understand the problems and terms when they can actually see them. While conducting the walk-through and writing the report, it is important to remember that some of the museum staff, board, or volunteers may not have a background in preservation. Avoid using acronyms and technical jargon whenever possible.



TIP: Take thorough notes and photographs on site. Photos are helpful to both the assessor and the museum. When reviewing the photographs, the assessor may spot a problem that wasn't discovered on site. Additionally, photographs illustrating problem areas can help museum staff more fully understand the problem described in the report text.

Assessors can meet and involve the staff, board members and volunteers in many ways. Invite them to join you on part of the walk-through so you can talk about issues with them while standing in a room or gallery. Schedule them to participate in the exit discussion. Make a slide presentation. Involving them will get them to "buy into" CAP, which can make or break an institution's commitment to implementing recommendations.

During the initial walk-through, consider how your guides view the collections and the building. Did they forget to take you into the basement? If so, they probably don't go down there often, so signs of moisture infiltration may have gone unnoticed for quite some time. Conversely, they may be overly focused on a particular issue. These are all helpful clues to how issues should be addressed. Are they readily able to answer your questions or access information you need? If not, you may have touched on an issue that does not get much attention.

**TIP: Make Mealtime Productive**

Mealtimes provide opportunities to bring more people into the process and gather critical information informally. During lunch conversation, ask staff members about their backgrounds. This allows you to gauge their level of professional training and whether they inherited problems or possibly created them. Casual observations such as, “I noticed the bricks were repointed; when was that done?” can lead to important insights about how the site functions. When it is necessary to arrive the night before, some assessors try to have dinner with board members that evening to get their input. Private, informal gatherings such as these can provide you with good information that is not appropriate for the report but essential to understanding the institution and what it might need to make things happen.

Exit Discussion

The exit discussion is the time for the staff and CAP assessors to review the institution’s expectations and goals of the assessments, discuss findings from the previous days, address remaining questions, and review the list of preliminary recommendations.

Recommendations should be classified as short-, medium-, or long-range. CAP museums are often limited by staff size and budget, so it’s important to fully understand these limits to ensure that the recommendations are appropriate and achievable.

And, as in the introductory discussion, it’s a good idea to include as many key players as possible in the exit discussion, since their involvement and investment in CAP is essential to its success.

Involving these key individuals also provides an opportunity to tell them how they can help the staff, and by getting their feedback you can incorporate their voice into the report, which encourages their “buy-in” with the report.

Sometimes, the museum will have a hidden agenda or unexpressed expectations for CAP. Often these

will come to light throughout the two-day site visit; however, the exit discussion is a good time to ask some diplomatic questions to clarify and help you tailor your report accordingly. Remember to close on a positive note. These institutions are doing the best they can in their given situations. While the CAP assessor is there to help staff identify problems, it’s also important to point out the positive things they’re doing.

**TIP: Training**

Sometimes CAP museums are very small sites that can be fully assessed in less than two days. Since the program was designed to cover two days on-site, many assessors will use the extra time productively by providing training. Perhaps one of the CAP recommendations is housing photographs in inert sleeves. The assessor could spend part of the second day reviewing how to select materials, handling, and storage techniques. Make sure the museum gets as many board, staff, and volunteers to attend as possible. You can encourage the museum to invite staff and volunteers from other institutions in their area, even at the last minute. This may be the first step in developing a local museum network that connects them with other people working on the same challenges. Down the road it might lead to joint purchases of supplies to take advantage of volume price breaks or perhaps even joint ownership of costly equipment such as a hygrometer or a light meter.

Historic Structures

Historic structure assessors should review exterior closure—evaluating each elevation, windows, and the roof—as well as the areas where problems occur most often, such as around chimneys, skylights, dormers and rainwater systems. Similarly, all aspects of the interior should be inspected. Begin with the foundation wall, basement wall and substructure floor and ceiling finish, and work upward to evaluate the main level and all other levels above, including the attic. In each instance, the assessor should identify the materials, their condition, and the need for housekeeping, repair, maintenance, or conservation.

Prior to assessing the building systems that play an essential role in environmental control, the assessor must examine interior wall finishes for evidence of problems that might affect the care of collections. Finally, there is the assessment of the type, age, and materials found in the building's plumbing, HVAC, and electrical systems.

The organization of assessment questions allows the historic structure assessor to gain an overview of the principal building materials and those building systems that may or may not be compatible with

these materials. Key questions relate to the condition of building materials, the presence or absence of adequate building closure, and the safety and/or appropriateness of the building systems that serve the structure. Improper or inadequate wiring, for example, can present one of the greatest threats to both the building and the collection.

The historic structure assessor is not expected to make explicit recommendations for revamping building systems. The assessment is a limited review whose purpose is to identify strengths and weaknesses. The assessment tells the client what building systems no longer serve current activities. Therefore, the historic structure assessor's role is to recommend the next steps in an architectural and/or engineering study. From there, the client can move towards revamping the building systems.

Since an evaluation of the collections and their condition is beyond the expertise of historic structure assessors, an historic structures assessor who precedes a collections conservator on-site should record and describe problems with collections but avoid drawing conclusions. Instead, the historic structures assessor must let the museum know that it should consider further assessment.