

Suggestions for SITE VISIT TEAM CHAIRS

This document was prepared by David G. Williams (West Virginia University) for use at his October 17, 2002 Accreditation Institute session for Site Visit Team Chairs at the NASPAA annual conference.

This paper is intended to provide insights and suggestions for chairs from his personal experience; it is not issued or endorsed by COPRA. NASPAA's Site Visit Team Manual (<http://www.naspaa.org/accreditation/visitors/manual.asp>) will provide helpful instructions and directions for team operation.

1. Role and Objectives of Site Visit Team (SVT).

- a. **SVT Orientation:** Team preparation and orientation is helpful, particularly for inexperienced SVT members and practitioner members. Chair should evaluate and prepare the team as well as anticipate program focus.
- a. **Fact Finding:** SVT does not evaluate and determine conformance to standards. The SVT is an inquiring arm for COPRA; it finds, clarifies and reports facts. The report presents and interprets facts relevant to the various standards. It is often difficult for faculty and practitioners to adjust to this mode.
- a. **Collegial Relationships:** Approach is collegial and cooperative. It is not adversarial or regulatory inspection. The tone should be professional colleagues gathering information for the benefit of the specific program and the field. The Chair helps set the tone and guide team members.
- a. **Avoid Do It My Way:** Avoid controversies in the field (in-service vs pre-service; location in independent unit, business or political science, etc.). Review the program based on their mission and approach and how well they make and support those. Avoid statements of "how it should be done" or "how we do it at my institution." (Note attached role plays.)
- a. **Professional Demeanor:** Maintain professional standards, confidentiality and integrity.
- a. **Avoid Pre-Judgement:** COPRA members have commented on occasion that some chairs and teams appear to pre-judge and thus limit their effectiveness. Some seem to pre-judge that the program is in compliance and does not need a thorough review or report. Others seem to have the flavor of pre-judgement that that particular kind of program or that specific program is not in compliance and nothing that they can show will matter. The Chair must maintain the team focus of being the eyes and ears of COPRA and not the determiner or decider of program result.

1. Logistical Planning:

- a. **Relevant Documents:** COPRA will provide the SVT with copies of the self-study report, standards, SVT instructions, interim report and other relevant documents. Check to insure currency and completeness.
- a. **Schedule Planning:** Discuss visit with program representative and agree on broad guidelines for the schedule. Leave the schedule details to the program representative.
 - i. **Program Scheduling:** The representative will have a better grasp of the people, appropriate interviews, times, efficient arrangements and so forth. It is impossible to micro-manage this effectively as a team chair.
 - i. **SVT Schedule Overview:** Rely on program representative to draft the schedule, but review it carefully. Note whether all important administrators have been included, formats and times for faculty interviews, interactions with students and graduates, etc.
 - i. **Balance Work and Social:** Consider the balance of interviews and social activities. Social activities can be very beneficial and can be effective ways to collect information, informally interview and talk specifically with a wide range of people. However, some program tend to over-do the social events, almost on the assumption that if they "wine and dine" extensively the visit will be successful.
 - (1) **Possible Conflict of Interest:** Be aware that arrangements that are too expensive, too fancy and too social or recreational can raise conflict of interest concerns.

- i. **Schedule SVT Time:** Do not overlook scheduling time for the Site Visit Team. It is helpful to have some time at the beginning to coordinate, share thoughts from the self-study report, and determine items for particular focus. It is important to have small times to coordinate as the visit progresses. It is very important to have time to review all standards and agree on the major outlines of the report before SVT members scatter. Some of this can be done over breakfasts and in between interviews, particularly as the SVT organizes coverage.
- a. **Local Arrangements:** It is usually best to ask the program representative to make all local arrangements for hotels and transportation.
 - i. **Determine Reimbursement Arrangements:** Discuss their preferences and arrangements for reimbursement. Some prefer to pick up many costs directly; others prefer that the SVT pay the costs and be reimbursed through NASPAA.
- a. **Time Frames:** A main contribution of the SVT chair is to provide general time frames, sometimes after preliminary consultation with SVT members. Most of the planning can proceed within the general time frames. A few e-mails will usually pin down airline arrivals. This gives the context for SVT member plans and program representatives to draft schedules.

1. Team Management:

- a. **SVT Manual:** Encourage SVT members to read the SVT manual. It will answer many of their questions. A brief discussion of key points is helpful to gauge team approach and preparation.
- a. **Manage SVT:** Adapt to and manage team efforts as you would with any team. Most team members want to work and give it full effort; a few do not. In some cases, the SVT chair may want to draft the full report and run it by team members; in other cases, the chair may want to delegate substantial portions and then coordinate assembly of the report.
- a. **Team Specialization:** While the team should be together for most major interviews, the team can split up for many purposes. For example, one person might audit the files, while another checks out library holdings and the computer center, while the third goes to talk with the city manager or other local practitioners about program reputation and service.

1. Organizational Structure and Support:

- a. **NASPAA Support:** When emergencies or problems arise that are beyond the SVT Chair and the program representative, NASPAA (particularly Laurel McFarland) can be helpful. These do arise regularly with illness, weather and various other contingencies.
- a. **COPRA Liaison:** When there are questions about what the concerns of COPRA were in the interim report or about standards issues, the COPRA designated liaison is the best contact person. Usually, COPRA divides into work groups and individuals are assigned to be the lead for specific programs in the review, presentation and report writing. This is usually the person designated as liaison. This person will usually have the most knowledge about COPRA issues.
- a. **Arrange Documents:** The SVT chair and the program representative should talk about the information that should be available to the team. Depending on the program and issues at hand, these could range from the cohort student files to be audited, to program advising outlines and materials, to syllabi, to theses or final reports. It is often helpful to have these available in a central location.
- a. **SVT Work Space:** Program arrangements will vary, but it is very helpful to arrange for work space and support for the team operations. For example, many programs can assign a conference room or an empty faculty office for a team meeting area. Some will be able to provide a computer. Program cohort files and other reference materials can be stored in the room.

1. SVT Interviews:

- a. **Interview Information:** In addition to the points listed under role and objectives of the SVT (above) and under

logistical arrangements, the SVT should manage and prepare interviews well because these will be the main source of information and evaluation.

- a. **Interview Formats:** Some interviews might be individual and others might be group. Depending on the size of the faculty, it is often best to interview them individually.
 - i. **Informal Formats:** Some of the best interviews are in receptions and dinners where concerns can be addressed more informally. Do not think of social occasions or receptions as just that; they often can elicit insights and information that is valuable.
 - i. **Constituencies Format:** Student and alumni group interviews often work best in an informal setting or reception. General meetings also work well. The SVT can meet with smaller groups.
- a. **Chair Interview Lead:** For many interviews, the SVT chair will have to set context, provide a little information about COPRA and the accreditation process, and establish a professional and friendly tone.
- a. **Non-Threatening Approach:** A key to the interviews is to extract helpful information in a non-threatening way. One approach is to ask about mission and tie the question into the mission.
- a. **Repeated Questions:** Some of the most helpful insights result from asking the same question to multiple audiences and individuals and comparing the results. This is often the best way to understand program mission and assessment systems. The SVT can ask what the mission is and about the mission statement. Questions can pursue the information that is collected and how it is reviewed. If the self-study report presents a well defined mission approach but faculty have no understanding of it, a great deal has been learned.
- a. **Interview Notes:** Interviews will elicit various insights and facts relevant to the standards. Be sure to take notes of critical points for use later. Record just the points related to COPRA concerns and standards.
 - i. **Recommendations and Commendations:** It is helpful to note various possibilities for the sections on commendations and recommendations as the team goes along. It is helpful to note important facts on the various standards. These lists can then form the basis for team review and use in the report.
- a. **Interview Focus:** It will be very helpful to develop some focus before the interviews so that relevant questions can be asked. These focus concerns will derive largely from the COPRA interim report and the SVT member reading of the self-study report. Additional points may arise from interviews or from the audit of the student files.
- a. **Program Director Multiple Interviews:** Experience has shown that multiple meetings with the program director can be helpful. A meeting at the beginning can review arrangements and get important clarifications and explanations of the major issues or concerns that will then shape later interviews. These understandings will make unnecessary some questions and will raise others. A concluding interview is usually helpful, but might be part of the exit interview.
- a. **Guide:** The program director will usually arrange a guide to go from interview to interview. For major administrators, it is hospitable for the program director to take the SVT and to introduce them. (Be certain that the program director understands that he or she should leave at that point.)

1. Site Visit Team Report:

- a. **Importance:** The SVT report is crucial because it presents the program to COPRA for their decision and it provides guidance to the program for focus and improvement. Do not spend all energies on the visit to the exclusion of report preparation.
- a. **Report Length:** The balance regarding length is a critical element. COPRA members often complain that some reports are too long (some can be epic presentations), but others are too short. Some reports discuss each standard (which is appropriate and called for in the instructions), but other reports make only a few comments on the standard section (general comments on faculty or curriculum without addressing the individual standards is not appropriate).
- a. **Fact Presentation Not Conclusion:** The SVT report should not be stated as a conclusion. Reports are sometimes received that state that the program meets all the requirements of the standard and leaves it without comment.

This takes the COPRA role and is an inappropriate report. It is sometimes just a matter of language. The report might simply state, for example, that the program has five full time faculty members fully involved in the degree program. It is then obvious to all that this meets the standard, but the conclusion that it meets the standard is reserved for COPRA.

- a. **Winnow to Critical Elements:** The guideline for the length and depth of the report is that it should be the length necessary to provide COPRA with the relevant facts. Some program reviews will of necessity be longer than others. Remember that COPRA members are reading 25 to 30 SVT reports. It is very helpful to winnow the report down to the critical elements. The important points should stand out and not be buried in too much unimportant detail. Neither should the points be left bald without development. Present the most critical points to the depth needed by COPRA; be succinct for the remainder.
- a. **SVT Involvement in Report Preparation:** The writing of the report may take different forms. In personal use and experience, reports have been written solely as chair, sections delegated to team members, and working out all wording in a joint conference. The approach should be adapted to team members, their willingness and organization and their experience.
 - i. **Chair Leadership:** Although there has been some variation, recent personal practice has been more toward the centralized model where the chair writes the report based on full standard by standard discussion (recent teams have had new members). The report is then circulated for editing to team members and then to the subject program.
 - i. **Team Involvement:** Team members should not be left out. Some SVT members have complained informally to COPRA that the chair wrote the report and that they had no input. At a minimum, there should be a full discussion of all team members and a collective listing of points and facts, from which the chair might write the report.
- a. **Agree Before Departure:** It is unwise to leave the site without having come to a SV team understanding of their report and facts on the elements of the interim report and on each standard (as well as recommendations and commendations). Every schedule should provide time for the SVT to come to agreement on all these elements.
 - i. **Review On-Site:** It almost never works to leave the program and then decide on report elements and facts as the report is written. It almost never works to assign team members sections of the report without having had a team discussion.
 - i. **Work on Elements Throughout:** Parts of the report can be worked out at different times during the visit as they team reviews interviews and concerns. Even breakfasts can settle some issues.
- a. **Recommendations and Commendations:** The team should not overlook the sections which have been added to the report on suggestions and commendations. These do not come into the judgement for accreditation by COPRA, but they are places where the SVT can recognize the good work and accomplishments of the program (commendations). The SVT can also make suggestions. Although care should be taken not to fall into the “this is how we do and you should too” trap, the SVT members can feed back helpful recommendations to the program. Many times it is helpful to feed back what has been heard on campus. Other times it is helpful to send subtle and supportive messages to higher administration.
- a. **Report Template:** One of the most helpful practices learned from experience has been the preparation of a report template before the visit. It is very useful in giving inexperienced team members an overview.
 - i. **Prior First Draft:** The template is the first draft of the report in essence. It includes the details of the report in the same order and format.
 - i. **Template for Section I and II:** The template lists the team members (so they can see how they are listed and correct titles and spelling). The template presents the non-controversial sections such as summary of institutional facts, background and mission, schedule and interviews (Section I and Section II).
 - i. **Template for Section III:** The template next presents Section III (concerns raised by COPRA). It lists each item from the COPRA interim report and then gives a summary of the COPRA concern and a summary of the program response (usually in italics so it can be distinguished from the SVT comments). This helps greatly to focus the SVT members and to show the concerns where facts and discussion must

be directed. Space is then provided for SVT notes and points.

- i. **Template for Section IV:** The next part of the template provides the outline elements of Section IV, the standard by standard assessment. The template provides the title and name of the standard and then leaves space for SVT notes and elements for the report. The non-controversial sections are already completed (number of years of program, institutional accreditation, etc.)
- i. **Outline for Discussion and Notes:** The template provides an outline for focus and a structure for notes. Most importantly, it provide the format for the team meeting at the end when the team goes point by point and decides what to say and facts to report under each of these sections. The team chair and members can then return home and type up the report using the concepts, facts and observations agreed upon in the template.
- i. **Report Efficiency:** The prior preparation of the template makes the preparation of the report much more efficient both in on-site discussion and post-visit writing.

1. Exit Interview:

- a. **Important Functions of Exit Interview:** An exit interview provides the SVT with the opportunity to thank the host program, to discuss their commendations and recommendations (recognizing that these are not part of the accreditation decision), review the schedule of the next steps (program response, COPRA review, etc.), and pre-figure very generally the report (without conclusions and detail).
- a. **Different Involvement:** Depending on discussions with the program director, the exit interview might be an open and frank discussion with the program director, it might involve all the faculty to educate them about the process and involve them in program improvements, or it might include higher administrators to provide better understanding of the accreditation standards and process and thus lay a foundation.
- a. **Comments without Determinations:** As always, remember the role of the SVT. Do not promise. Do not make conclusions. Do not infringe on the role of COPRA.
- a. **Gracious Response:** It is always appropriate to thank the program for their hospitality, their time, their participation in the interviews and their work as fellow colleagues in the field.
 - i. **Thank You Letters:** It is also appropriate to sent follow-up thank you letters. Personal practice has been to write thank you letters to the program director and to all the higher administrative officials with whom interviews have been conducted. This also helps to develop program support at the higher levels.

1. SVT Chair Ability:

- a. **Overcome Reluctance:** Some persons have been reluctant to chair a site visit team. It does entail extra time and effort, but it is an important contribution to the field. Almost all chairs find the experience to be positive and an enjoyable interaction with colleagues. Personal experience has been that many good ideas and insights have been gained from site visits.
- a. **Just Do It:** Many have felt that they were not prepared adequately, expert enough in accreditation, or sufficiently experienced to be a SVT chair. Personal experience as a SVT chair and as COPRA chair is that these concerns are usually not justified. As with most challenges and tasks, you just have to jump in, work out the details, and learn as you do. Almost all SVT chairs have been successful. If one remembers that a site visit team is just an interaction with colleagues to discuss and improve the field, the apparent challenge become more an opportunity. In almost all cases it is very enjoyable and doable.