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# *Being an effective Site Visitor*

*(Refresher on Site Visit Roles, Responsibilities, and Procedures)*

Updated October 2020



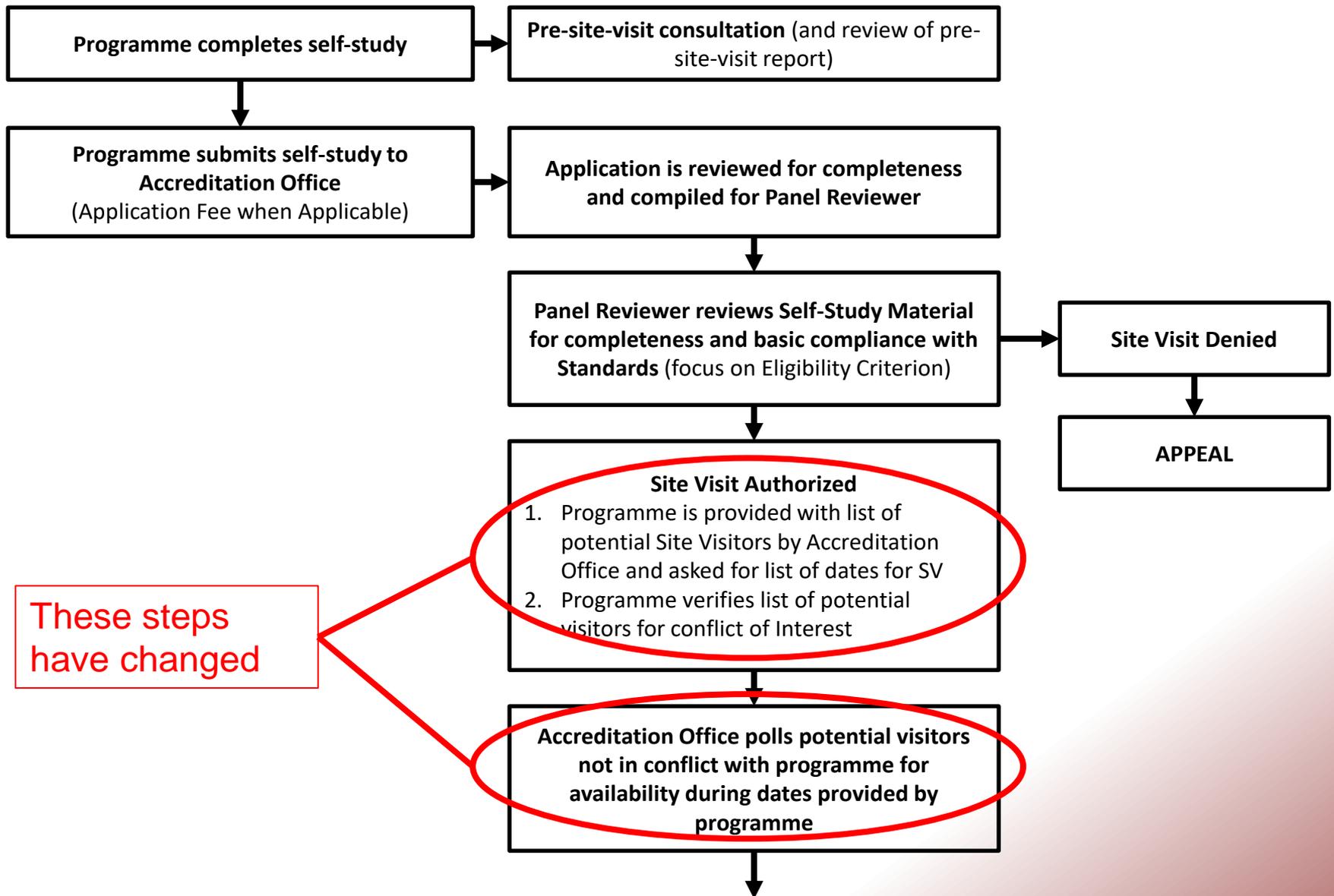
# Outline

- The Accreditation Process
  - Site visit procedures review
- Roles and responsibilities of site visitors
  - Site Visitor Conflicts of Interest
- Guidelines for Site Visit planning and report writing
- Virtual Site Visits



# The Accreditation Process

*Many updates have been made to accreditation processes since the last revision of the Standards*



These steps have changed

(Continued on next page)

**Once a match is found, Accreditation Office notifies programme of SV dates**

1. Invitations are issued by the programme
2. Programme sends SS material to SV team and reserves accommodations
3. Accreditation Office sends other preparation material to SV team

This step has changed

**Site Visit**

1. Team Planning Session
2. Scheduled interviews
3. Closing interviews
4. Draft Report

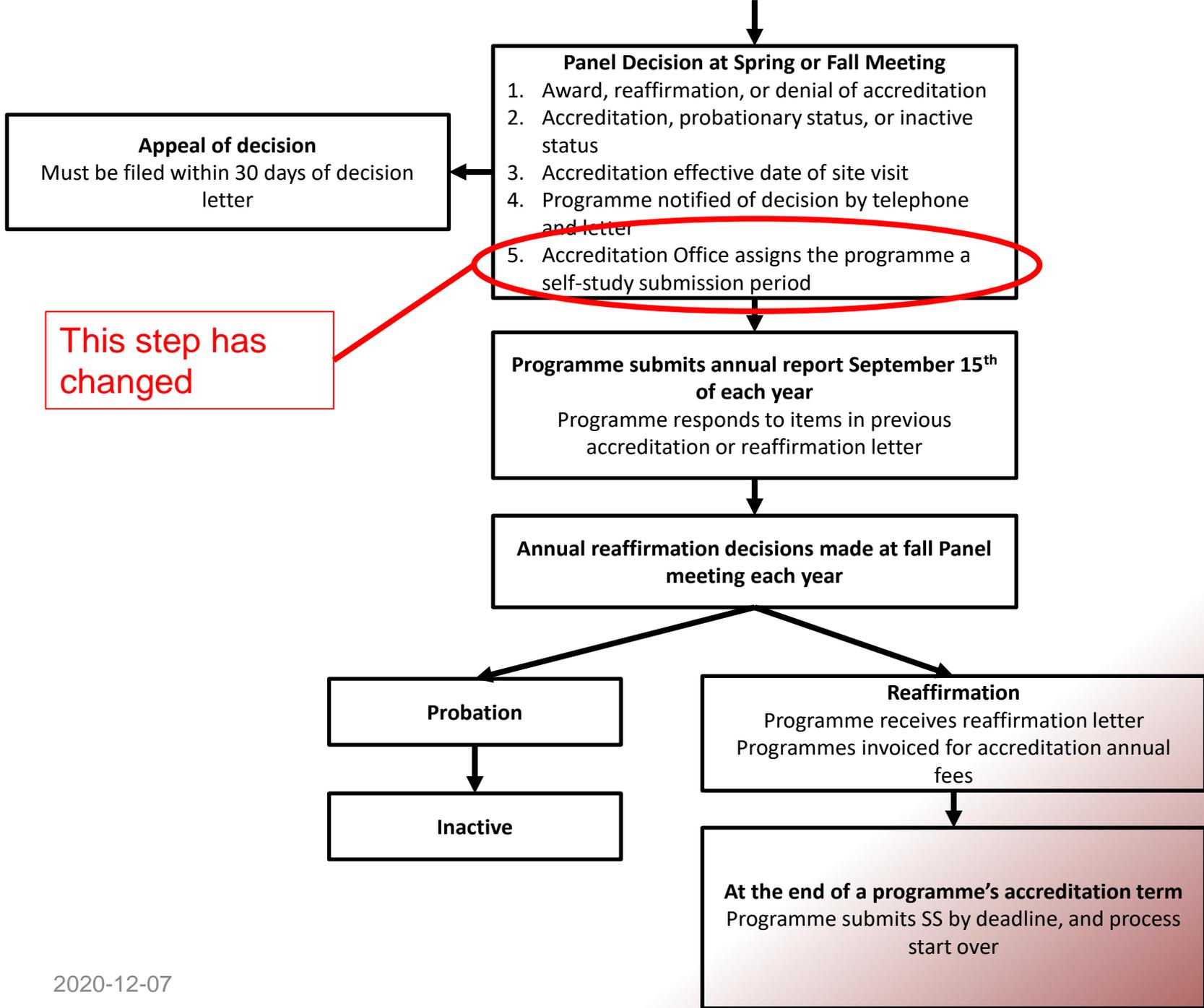
Complaints against Site Visitors

**Site Visit Report**

1. Prepared according to CPA Guidelines, and submitted to Accreditation Office within 30 days of visit
2. Report sent to programme for response

**Programme Response to Report**

1. Submitted to Accreditation Office within 30 days of receipt
2. Response includes objections, corrections, and additional information
3. Programme invoiced for SV





# Changes to the Accreditation Process

- All site visit scheduling and site visitor selection is now handled by the Accreditation Office, meaning that:
  - Programmes do not select their site visit team, but rather vet a short list of site visitors from which their team can be formed.
  - Programmes provide sets of dates that are amenable for a site visit, and the dates on which a team is available are selected.



# Changes to the Accreditation Process

- Another major change is the use of deadlines for self-study submissions
  - Designed to balance workload of Site Visitors and Panel
  - Ensures that site visits occur at optimal times (e.g. during academic year for doctoral programmes)
  - Programmes informed in advance of their submission deadlines (now included in reaffirmation and reaccreditation letters)



# Changes to the Accreditation Process

- Procedures are now separate from Standards, and will be revised differently
  - The Standards will continue to follow the same revision process as in the past.
  - As the procedures are required to adapt to the changing needs of the training community, the Procedures will be changeable by the Panel and the Board of Directors.
  - For more information, please see the new procedures document at: <https://cpa.ca/accreditation/resources/>



# Changes to the Accreditation Process

- No more joint CPA-APA accreditation (now covered by First Street Accord)
  - As of 2015, the APA no longer accredits programmes in Canada, and the CPA does not accredit programmes in the USA.
  - Instead, the CPA and APA signed the First Street Accord, which recognizes the equivalence of each association's accreditation systems, and ensures continued exchange of information between the signatories.
  - For more information, please see:  
<https://cpa.ca/accreditation/accreditationthroughoutnorthamerica/>



# Site Visit Team Selection & Preparation

- Accreditation Office sends programme a list of potential site visitors and asks for a list of potential dates for the SV
- Once the programme has vetted the list to ensure there are no conflicts, the Accreditation Office polls the site visitors for availability on the dates selected by the programme.
- Once a team is selected, the DoT of the programme sends the self-study to each site visitor
- CPA office provides any other info about programme (e.g. past reaffirmation letters, accreditation history, **questions from Panel reviewer**)
- SV's familiarize themselves with S&P, self-study
- Formulate questions, items for clarification/elaboration
- Chair's role:
  - Confirm SV schedule with DoT
  - Assign tasks to SV team members
  - Ensure submission of report



# Roles and Responsibilities of Site Visitors

## Purpose of Site Visits:

- Assess degree of compliance with S&P, including confirmation of information included in Self-Study.
- Understand programme in light of its own philosophy, goals, objectives, & outcomes
- Report on aspects of programme less clear on paper or impossible to include in Self-Study

E.g.: atmosphere of collegiality/respect among faculty/students, review of student files.



# Roles and Responsibilities of Site Visitors

## Site Visitor Responsibilities:

- Act as **representatives** (vs decision makers), “Sensors” (vs “Censors”)
- Collect on-site data to enhance & verify self-study
- Responsibility of the SV team **ends** with submission of **SV report** (no other contact with the programme until after the Panel has made their decision).

***\*\*It is important to remember that feedback to the programme must be limited to the intended contents of the site visit report; Site Visitors cannot guarantee that a programme will be accredited, nor can they comment on any expected terms of accreditation.***



# Conflict of Interest – Site Visitors

- Former employment at programme
- Former graduate student/intern at programme
- Family connection with the programme
- Significant personal or professional connection with the programme (within the last five years)
- Previous site visitor on immediately preceding site visit
- Conflict with another member of the team
- **AND ANY OTHER SIGNIFICANT CONFLICTS IDENTIFIED BY SITE VISITORS OR THE PROGRAMME (IF UNSURE, PLEASE CONSULT WITH THE ACCREDITATION OFFICE)**



# Guidelines for Site Visit Planning

- Please refer to the “Guide to the Standards for Site Visitors” handout and the sample questions included in the Accreditation Standards Manual and the draft Site Visitor Guidebook (May 2017)



# The Site Visit Report

## Process of Writing the Site Visit Report:

- Chair has ultimate responsibility for ensuring report is submitted, but all team members contribute to writing report
- Agree at the outset of the SV how the report will be written and which team members will likely take the lead on which sections
- Re-confirm these plans at the end of the SV
- If possible, obtain copies of each other's notes before leaving the site



# Writing an Effective Site Visit Report

- Greatly facilitated by good preparation
  - Thorough review of SS, relevant Q's during SV, division of labour
- Let the Standards be your guide
- Best reports are concise yet comprehensive
- Focus is on observations – information – data which help to demonstrate the extent to which the programme is consistent with the standards
  - *Without providing a judgment of this extent – can be tricky to refrain from evaluating!*
  - *Emphasize the 'how' and 'what'*
  - *When in doubt, cite data sources (e.g. conversations, documentation, etc.)*



# Other Important Resources

- Accreditation Standards (including Quick Reference Guide)
- Accreditation Procedures
- Site Visitor Guidebook
- Guide to the Standards for Site Visitors



# Considerations for Virtual Site Visits

Due to COVID-19, the site visit procedure has changed.



# Virtual Site Visit Changes

- All meetings conducted as part of virtual visits will be held on Zoom.
  - All meeting will be held between 12-5 PM Eastern time unless otherwise agreed upon by the SV Team Chair and the Programme Director
- All programmes will submit a “virtual tour” of their campus/facilities prior to the site visit (in a format of their choosing).



# Virtual Site Visit Changes

- Site visitors and programmes will be allowed to extend their “visits” to 3 days to allow for further meetings or follow-up.
- Documentation review (e.g. student file reviews, work sample reviews) will be organized by the programmes per their institutional, provincial, and federal privacy policies and laws.



# Using Zoom

- The Accreditation Office will supply the SV team Chair with login information for one of CPA's Zoom host accounts.



# Using Zoom

Once logged in, you will see a screen like this:

The screenshot shows the Zoom website dashboard. At the top right, there are links for 'REQUEST A DEMO', '1.888.799.5926', 'RESOURCES', and 'SUPPORT'. Below this, the Zoom logo is followed by 'SOLUTIONS', 'PLANS & PRICING', and 'CONTACT SALES'. On the right side, there are links for 'JOIN A MEETING', 'HOST A MEETING', and 'MY ACCOUNT', which is circled in red. A red arrow points from the 'MY ACCOUNT' link to the text 'Click here' on the right. Below the navigation is a green banner with the text: 'We have developed resources to help you through this challenging time. [Click here](#) to learn more.' Below the banner is a 'zoom academy' section for 'SUMMER 2020' with the heading 'Ready for Back-to-School?'. The text below the heading reads: 'Teachers, School Leaders, and IT Staff - Watch the recordings from the Zoom Academy | Summer 2020 for best practices and expert training on how to use Zoom!'. There is an orange 'Watch Now' button. The background features an illustration of a person working at a desk under a large tree, with a blue bird flying nearby.



# Using Zoom

The screenshot shows the Zoom web interface. At the top, there is a dark blue header with the Zoom logo and navigation links: SOLUTIONS, PLANS & PRICING, and CONTACT SALES. Below this is a light gray sidebar with the heading 'PERSONAL' and a list of menu items: Profile, Meetings, Webinars, Recordings, and Settings. The 'Meetings' item is circled in red, and a red arrow points from the text 'Click here' to it. To the right of the sidebar, there is a user profile section for 'Stewart Madon' with a placeholder for a profile picture and a 'Change' link below it. The 'Account No.' field is redacted with a black box. A large black redaction box is also present at the bottom of the page content.



# Using Zoom

The screenshot shows the Zoom web interface. At the top left is the Zoom logo. Navigation links include SOLUTIONS, PLANS & PRICING, and CONTACT SALES. On the right, there are links for SCHEDULE A MEETING, JOIN A MEETING, and HOST A MEETING, along with a user profile icon. A sidebar on the left lists PERSONAL options: Profile, Meetings (highlighted in blue), Webinars, Recordings, and Settings. The main content area is titled 'Meetings' and includes tabs for Upcoming, Previous, Personal Room, and Meeting Templates. A filter bar shows 'Start Time to End Time'. Below this, a date filter is set to 'Mon, Oct 5'. A meeting entry is visible for '03:00 PM - 04:00 PM' titled 'AAAC Board Meeting'. A red arrow points from the text 'Click here' to a 'Schedule a Meeting' button, which is circled in red.



# Using Zoom

Fill out the appropriate Topic/meeting title, as well as the date and time using the drop-down menus.

PERSONAL

- Profile
- Meetings**
- Webinars
- Recordings
- Settings

ADMIN

- > User Management
- > Room Management
- > Account Management
- > Advanced

My Meetings > Schedule a Meeting

Schedule a Meeting

Topic

Description (Optional)

---

When

Duration  hr  min

Time Zone

Recurring meeting



# Using Zoom

[Attend Live Training](#)

[Video Tutorials](#)

[Knowledge Base](#)

Registration  Required

Meeting ID  Generate Automatically  Personal Meeting ID 743 279 1158

Security  Passcode   Waiting Room

Video

Host  on  off

Participant  on  off

Audio  Telephone  Computer Audio  Both

Dial from United States of America [Edit](#)

Ensure that these are both on

Click “edit” and add “Canada”  
to the “dial from” options



# Using Zoom

## Meeting Options

Enable join before host

Mute participants upon entry 

Only authenticated users can join

Automatically record meeting

Enable additional data center regions for this meeting

Ensure that this is on



You can assign the other site visitors on your team as alternate hosts by entering their email addresses here

## Alternative Hosts

Example: mary@company.com, peter@school.edu



Click here to save

Save

Cancel





# Using Zoom

|                 |   |       |      |   |
|-----------------|---|-------|------|---|
| Security        | ✓ Passcode  | ***** | Show | × Waiting Room  |
| Invite Link     | <a href="https://us02web.zoom.us/j/89034563618?pwd=SHFtUHlCa3dlY2ZJbmVickhOWDNRZz09">https://us02web.zoom.us/j/89034563618?pwd=SHFtUHlCa3dlY2ZJbmVickhOWDNRZz09</a> |       |      |  Copy Invitation |
| Video           | Host  | Off   |      |   |
|                 | Participant   | Off   |      |   |
| Audio           | Telephone and Computer Audio  |       |      |   |
|                 | Dial from United States of America  |       |      |   |
| Meeting Options | × Enable join before host   |       |      |   |
|                 | × Mute participants upon entry   |       |      |   |
|                 | × Only authenticated users can join   |       |      |   |

Once your meeting is saved, you can click here to copy the meeting information to send it via email





# Using Zoom

Copy Meeting Invitation



Meeting Invitation

Stewart Madon is inviting you to a scheduled Zoom meeting.

Topic: Test SV meeting

Time: Sep 28, 2020 03:00 PM Eastern Time (US and Canada)

Join Zoom Meeting

[https://us02web.zoom.us/j/89034563618?](https://us02web.zoom.us/j/89034563618?pwd=SHFtUHlCa3dY2ZJbmVickhOWDNRZz09)

[pwd=SHFtUHlCa3dY2ZJbmVickhOWDNRZz09](https://us02web.zoom.us/j/89034563618?pwd=SHFtUHlCa3dY2ZJbmVickhOWDNRZz09)

Meeting ID: 890 3456 3618

Passcode: 247751

One tap mobile

+16699006833,,89034563618#,,,,,0#,,247751# US (San Jose)

+19292056099,,89034563618#,,,,,0#,,247751# US (New York)

Dial by your location

+1 669 900 6833 US (San Jose)

+1 929 205 6099 US (New York)

+1 253 215 8782 US (Tacoma)

+1 301 715 8592 US (Germantown)

Simply select the text in the box,  
and copy+paste it into the email or  
calendar invitation for the appropriate  
meeting

Copy Meeting Invitation

Cancel



# Using Zoom

To start a meeting, hover over your meeting in the meetings menu, and click on the “start” button after it appears.

Upcoming Previous Personal Room Meeting Templates

Start Time to End Time [Schedule a Meeting](#)

Mon, Oct 5

|                     |  |                       |                      |                        |
|---------------------|--|-----------------------|----------------------|------------------------|
| 03:00 PM - 04:00 PM | <b>AAAC Board Meeting</b><br>Meeting ID: 895 5101 7873 | <a href="#">Start</a> | <a href="#">Edit</a> | <a href="#">Delete</a> |
|---------------------|--|-----------------------|----------------------|------------------------|

Click here to Start