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
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

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

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

(Continued on next page)
Panel Decision at Spring or Fall Meeting
1. Award, reaffirmation, or denial of accreditation
2. Accreditation, probationary status, or inactive status
3. Accreditation effective date of site visit
4. Programme notified of decision by telephone and letter
5. Accreditation Office assigns the programme a self-study submission period

Programme submits annual report September 15th of each year
Programme responds to items in previous accreditation or reaffirmation letter

Annual reaffirmation decisions made at fall Panel meeting each year

Reaffirmation
Programme receives reaffirmation letter
Programmes invoiced for accreditation annual fees

Probation

Inactive

At the end of a programme’s accreditation term
Programme submits SS by deadline, and process start over

Appeal of decision
Must be filed within 30 days of decision letter

This step has changed
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:
Using Zoom

Click here
Using Zoom

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

Ensure that these are both on

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

Ensure that this is on

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

Click here to save
Using Zoom

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

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?pwd=SHFTUHiCa3dIY2ZJbmVickhOWDNtZz09

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.
Using Zoom

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

Click here to Start