HOW TO STOP WORRYING AND EMBRACE AN ON-SITE TEAM VISIT

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> *When properly done, the self-study displays the match between the institution's aspirations and its day-to-day accomplishments. From this, the visiting team can evaluate the institution and focus sharply on areas needing improvement, in a collegial fashion that is meant to avoid the alienation that might come with official inspectors.*
> *--Kenneth Young, First President of the Council on Postsecondary Education (1983, p. 25)*

Site visits are a shared component of accreditation processes. They often represent the culmination of years of preparation and substantial investment in time, money, and resources by institutions, programs, and accreditors. During such periods, accreditors depend on volunteer peer evaluators to verify the program or institution under review demonstrates congruency with the expectations of their accreditation standards. Without appropriate preparation, these visits can be unfocused, unclear, or frustrating to members of a host institution or program and volunteer team members. While I served as President of the Association for the Assessment of Learning in Higher Education (AALHE), I often heard assessment practitioners whose institutions were engaging in accreditation visits express anxiety about review visits. In a recent presentation on the CHEA Accreditation Podcast Series (Council for Higher Education Accreditation, 2022), Dr. Belle Wheelan, President of the Southern Association of Colleges and Schools Commission on Colleges, discussed how site visits could be "angst producing" and provided suggestions on how to make site visits run smoothly. Her theme resonated with me. In this article, I summarize a few of Dr. Wheelan's recommendations, expand on some aspects, and provide a few of my own to help assist those responsible for planning and carrying out these visits.

PREPARING FOR THE VISIT: WHERE IT ALL BEGINS

Linda Suskie (2016) refers to accrediting organizations as private clubs. Like private clubs, these organizations require their members to voluntarily demonstrate alignment between their actions and commission standards to be eligible for entry or continued membership. The staff person at the accrediting organization is the gateway to future membership and a key ally during the reaccreditation process. Dr. Wheelan recommended that staff members at the host institution "make fast friends with their staff person at the accrediting agency." She said:

"Make sure you know who the staff person is at the accrediting organization that is assigned to work with your institution in preparing for the visit. That will be the person who will get you through that process, so make friends with them quickly. Don't feel badly calling or emailing for information or support. That's what they are there for."

Regular and clear communication between accreditation staff members and those individuals responsible for carrying out evaluations can help everyone involved with the visit work toward common goals.

Wheelan recommended that participants in a site visit pay attention to the organization's website for resources. Based on her recommendation, I examined several sites. I found that several accreditors provided resources to help participants in site visits, such as sample meeting agendas, itineraries, webinars, and podcast recordings. Some websites even offer advice on how to discuss the topic of accreditation in a host institution. For instance, the Middle States Commission on Higher Education website (Middle States Commission on Higher Education, 2022) suggests that self-study planners "focus on the usefulness of the self-study process to motivate the institution" and propose that this process will help the institution gain insight from peer volunteers. This language on the MSCHE website could suggest that staff members of a local institution who are expected to support a review might gain community support by emphasizing accreditation's unique role as a quality assurance system and one that is "unusually focused on the future" (Brittingham, 2009, p. 17).

Another reason local institutions and volunteer team members need to review web resources before a review is that accreditation policy is gradually evolving and changing. By reviewing training materials before a review, including accreditation policies, site reviewers can help protect the review's integrity for the host institution and volunteers. Experienced participants might review policies and procedures before a visit and note any changes since the last time they engaged in a review. These policies might guide decisions about who review team chairs should invite to meetings and exit interviews and when teams are expected to submit final evaluation reports to the institution.

While observing the work of volunteer evaluation team members and during my interactions with accreditation consultants, I have noted these individuals encounter difficulties in verifying whether an institution meets standards when broken hyperlinks are referenced in a self-study report or evidence inventory. Broken hyperlinks are a barrier for reviewers. Reviewers can more easily conduct their review when hyperlinks take them to the appropriate web location.

Organized and clearly labeled evidence inventories can also promote smooth reviews for peer evaluators and host institution members by assisting peer evaluators in locating evidence that will quickly allow them to evaluate whether the institution demonstrates congruency with the expectations of the standards or understand what other evidence is needed to accomplish this task. Evidence inventories take different forms. In some instances, these repositories are located in databases controlled and managed by an accreditor. In others, they are housed by a local institution. Jane Marie Souza, Past AALHE President and Associate Provost at the University of Rochester, presented (2020) different approaches to organizing evidence inventories using resources common to institutions, like Microsoft Sharepoint, and more sophisticated systems created by privately owned assessment management systems. Regardless of the technology, she suggests that local institutions conceptualize these repositories as an "institutional memory bank" that helps the many different divisions of an institution or program tell their story about educational quality and the future. I have found Souza's approach to be helpful as a member of a local host institution.

In preparing to host site visits and as a volunteer peer reviewer, I have found that evidence inventories using a standard file naming format have made my work easier. Clear and consistent file labels have helped me to quickly skim extensive inventories to help me understand the relation with standards. In labeling files, I prefer when files are named to include an abbreviation of the standard and criterion to which this evidence applies. For example, files that support claims in a self-study report about specific standards and criteria might have common file naming approaches: a file pertaining to an accreditor's standard II, criterion 2, and subcriterion might be labeled as "SII.2a" at the beginning of the file name. The file name's end might indicate the document's name and publication date. If the evidence used to support this standard was a faculty satisfaction survey from 2020, the document might be labeled as "SII.2a_facultysatisfaction_2020." Members of a local steering committee group could agree upon a file naming approach and make this strategy clear to review team members before the visit so they will quickly understand how to skim inventories to verify the relation with standards.

DURING THE VISIT: FOCUSING ON THE TASK AT HAND

At every hour devote yourself in resolute spirit…to fulfilling the task in hand with a scrupulous and unaffected dignity, and with love for others, and independence, and justice; and grant yourself a respite from all other preoccupations. And this you will achieve if you perform every action as though it were your last. --Marcus Aurelius, Meditations (p. 11)

Accreditors have adapted quickly to remote working environments, but these new work arrangements have created new obstacles for volunteer peer evaluators. In remote and hybrid visits, reviewers often use tools such as Microsoft Teams to communicate with their other team members and engage in work for their home institution. The activity of leaving an institution to travel to another provided campus members with some space between their professional position and their volunteer role for a commission. Several

AALHE members who served as team members noted the difficulty in focusing on their reviews due to last-minute requests from their campus leaders. To avoid these distractions, I suggest that team members inform their institutional leaders early on that they will be engaging in a cognitively intensive peer evaluation visit and that their availability will be limited during these periods. Team members might set their out-of-office replies earlier and remind their colleagues at their local institution about this obligation to the commission. For host institution members, requesting key staff to remain available to answer evaluation team questions during the two-to-three days over which a visit is scheduled can be helpful to facilitate the work of volunteer teams.

Many peer evaluators have busy schedules and professional roles. Therefore, it can be helpful for these individuals to begin their work well before the site visit whenever possible. Such planning can help reviewers focus on their role for a commission during a visit. To help members at a host institution plan, teams can also send lists of the individuals they would like to meet with and questions that they would like these individuals to answer. Host institution members should anticipate getting last-minute requests from team members. By sharing areas needing additional verification with the host institution as early as possible, the members of a host institution can help the committee complete their work effectively.

Site visits bring together people working in different programs, institutions, and work cultures. Having clear guidelines for how meetings should take place can help make these meetings inclusive and focused. For instance, team chairs might ask meeting attendees to select the option to raise their hands in virtual meeting rooms in Zoom or Teams and ask for attendees to be called upon before they speak. Some meeting chairs welcome Zoom chat boxes, but these options can distract some people. By clearing communication meeting expectations, team chairs can help focus meetings on their goals.

CONCLUSIONS

In this article, I shared some practical tips on ensuring that this process runs smoothly and, hopefully, in a way that supports collegiality by those within institutions and among volunteer peer evaluations serving on behalf of the commission. This topic deserves further attention because site visits represent the culmination of years of work on a self-study process. Poorly planned site visits can inhibit the work of peer evaluators, cause confusion in host institutions, and create unnecessary anxiety for those involved in the review. Other areas should be considered more closely when planning for a smooth visit, including the need to navigate different time zones. These visits are significant aspects of the accreditation process and part of the search for quality. In Zen and the Art of Motorcycle Maintenance, Robert Persig (1974) described quality as a concept, stating

> *Everyone seeks quality, consciously or subconsciously...And when someone brushes up against quality, that person almost always recognizes and appreciates it--whether it is in the form of a fine symphony or an excellent tune-up."*
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> *--Robert Persig (1974, p. 218)*

The success of a visit might rest in the ability of the peer evaluation team to recognize and appreciate an institution's demonstration of congruency with the expectations of accreditation quality standards.

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