

Caring for Your Guests: the Visiting Team

Linda Birtley, Accreditation Liaison, Union Presbyterian Seminary

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Reviewers Are Your Peers

Who has served as a SACSCOC Peer Reviewer?

Who has been a reviewer for an on-site visit?



Be Our Guest!

It doesn't have to be a big production!

Make the reviewers comfortable, give them what they need to do their part of the process.

Making the visit pleasant for your reviewers is always appreciated (and usually helps you!)



Have a Logistics Point Person (or Two)

The point person:

- Is the contact for the committee chair and SACSCOC VP for all visit logistics (technology assistance, documentation requests, scheduling changes)
- Will meet with all other groups assisting with visit logistics (catering, transportation, lodging, interviewees, etc.)
- In charge of the master plan

Logistics Master Plan Includes:

- Schedule
- Space arrangements (hotel, on/off campus space)
- Supplies
- Food
- Transportation
- Technology
- Communication
- Expenses

Let the Visiting Team Know...

You've got them covered!

- Send confirmation/logistics packets before they travel
- Prepare and present a welcome binder upon arrival

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USB FLASH DRIVE

NAME BADGE

COMMITTEE SCHEDULE

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MONDAY EVENING DINNER OPTIONS

PRIVATE COMMITTEE DINNERS

MAP OF HOTEL

MAP OF TAYLOR HALL

JMU CAMPUS MAP

Make It Easy for Everyone

- A command post for your institution reps and logistics
- A single chauffeur for the entirety of the visit
- If possible, keep it contained! (reserve rooms all in the same building – bring interviews to the team)

James Madison University SACSCOC On-Site Interview Schedule		
Tuesday, April 2		
4:00-4:20 PM		
Committee Member	JMU Representatives	Room
Dr. [REDACTED]	Mark Warner, Senior Vice President, Student Affairs and University Planning James Robinson, Director, Office of Equal Opportunity Jim McConnel, Associate Vice President, Student Life; Dean of Students Susan Wheeler, University Counsel Teresa Gonzalez, Vice Provost, Academic Programs Art Dean, Special Assistant to the President, Staff & Student Diversity Josh Bacon, Director, Office of Judicial Affairs	Taylor 402
Standards: CS 3.13.3 (Policy Compliance – Complaints) FR 4.5 (Student Complaints)		
4:00-4:30 PM		
Committee Members	JMU Representatives	Room
Dr. [REDACTED] [REDACTED]	Jon Alger, President, James Madison University Jerry Benson, Provost & Senior Vice President, Academic Affairs Charlie King, Senior Vice President, Administration & Finance John Knight, Associate Vice President, Finance Diane Stamp, Assistant Vice President, Budget Management Lee Sternberger, Associate Provost and Executive Director, Office of International Programs	Taylor 303
Standard: CS 3.3.2 (Quality Enhancement Plan)		
Committee Member	JMU Representatives	Room
Mr. [REDACTED]	Donna Harper, Senior Vice President, Access & Enrollment Management Lisa Tumer, Director, Financial Aid & Scholarships	Taylor 307
Standards: CS 3.10.2 (Financial aid audits) FR 4.7 (Title IV program responsibilities)		

Don't Forget Your Institution Representatives!

- Meet with everyone who will come into contact with the visiting team
- Conduct post-interviews

PREPARING INSTITUTION CONTACTS

- Meet with and prep individuals who provide transportation to the committee and go over the entire schedule to anticipate any problems. Map out routes from the airport to hotel to campus to any other locations.
- Prep executive team and president's office for meeting committee.
- Meet with administrators to outline what will be needed from their unit.
- Students are often good campus guides to take Committee members from the campus workroom to interviews and other appointments on campus, and Committee members thoroughly enjoy meeting your students. Make sure these students know your QEP! Give students a room in the building with the command center and committee workroom and have several students available at all times to walk committee members to an interview or wherever they need to go.
- Meet with all front line staff. Emphasize the impression that they will make. Explain that if they are asked for documentation, how they should respond (write the details of the request and who/where it should be delivered, then get the requested documentation to the accreditation liaison ASAP.)

Resources and Examples

- SACSCOC Handbook for Institutions Seeking Reaffirmation
<https://sacscoc.org/app/uploads/2020/03/Handbook-for-Institutions-Seeking-Reaffirmation.pdf> (has a lot of information about visits)
- SACSCOC Logistics of Committee Visits
<https://sacscoc.org/app/uploads/2019/08/travel-commit-visits.pdf>
- SACSCOC Handbook for Review Committees
<https://sacscoc.org/app/uploads/2019/08/Exhibit-18.HandbookForReviewCommittees.pdf> (so you are familiar with the committee's charge)
- Examples and Templates for Logistics
https://www.jmu.edu/sacscoc/pres_care.shtml (please note these are old examples from a 2013 visit to JMU)
- Reach out to your VRAS colleagues!

The Care and Feeding of a Visiting Committee



Supplemental Information and Downloads for Presentation: The Care and Feeding of a Visiting Committee

[Care and Feeding of a Visiting Committee Presentation](#)

[Basics Checklist](#)

[Sample Forms](#)

[Sample Templates](#)

The Basics Checklist and Timeline

- Two years out (if you have that!)
- One year
- Six months
- Three months
- Two weeks
- Early arrivals
- During the Visit

THREE MONTHS

- Send the committee member information request form
- Research the bios of your committee members, find out more about their professional interests. Where possible let them be escorted by or meet with members of your institution with similar interests.
- Verify all reservations, finalize details on campus and off campus arrangements
- Make arrangements to get temporary cell phones for all Logistics group (so they don't use their personal phone)
- Provide briefing sessions for all campus constituencies that will come into contact with the committee
- Meet with administrators from each area (Resources, Academics, Student Life, etc.) to make sure they know what may be requested from their area. Prep them on areas of the Compliance Certification that were questioned and addressed in the Focused Report.
- Make sure anyone who will be in interviews with the committee has read and has access to the Compliance Certification, off-site review comments, QEP, and Focused Report. You may want to highlight the standards that are directly affected by their area.

TWO WEEKS

Committee Members and Committee Chair

- Send personalized confirmation packets
- Request the interview list from the committee chair
 - Schedule interviews with rooms and interviewees
 - Be prepared for last minute changes and additions

Scheduling

- Make arrangements for delivery and pick up of copiers/printers and supplies for committee workrooms
- Provide personalized schedules and logistics team contact listing:

On-Site Visit Tips

**Drawn from two on-site
visits in March 2022**

**Linda Birtley
Accreditation Liaison
Union Presbyterian
Seminary**



Ensuring availability of faculty, staff, students

- Require key faculty and staff to be available before, during, and after on-site
 - Send notice from president at least six months in advance
- Identify any faculty or staff who likely will need to travel to main campus or off-site locations
- Recruit board members in advance for in-person or virtual meeting
- Provide orientations, as needed

Developing on-site schedule

- Request the number of the standard for any meeting requested
- Consider consolidating meetings
 - Same participant and/or same reviewer
- Decide which mix of individuals will respond to QEP topics –separate meetings
 - QEP Leadership/Implementation Team (60 min including 20 min for presentation)
 - Examination of Focus and Assessment (45 min)
 - Examination of Institutional Capacity and Campus Involvement (45 min)
- Invite faculty, staff, or students to group meetings as early as possible
- Schedule on-campus meetings in one building that has multiple rooms available

Greeting reviewers

- Provide meal options in advance (e.g., recommended restaurants)
- Greet with a sign at airport baggage claim or terminal security exit
- Greet at the hotel for initial arrivals to point out work room and any extras (e.g., laptop for a Reviewer, work space set-up)
- Welcome sign on-campus + QEP displays
- Ensure travel to and from campus is smooth
 - Station someone at the hotel and at the campus
 - Provide cell phone numbers

Supporting reviewers

- Staff or student posted outside on-campus committee work room
- Staff or student posted strategically to steer people to meeting rooms
- Liaison available for
 - Adding meetings and communicating updates
 - Removing meetings and communicating updates
 - Managing document requests
- IT responsible for
 - Set-up at hotel and campus work rooms
 - Floating on-campus to ensure no tech issues
- Designated individuals to remind participants of upcoming meetings

Planning for hybrid meetings

- Establish Zoom links
 - Determine whether Reviewer wants any institutional presence for meeting kick-off
- Notify of Zoom links
 - Reviewer
 - Participant(s)
 - IT Staff
- Coordinate on-campus room set-up
 - Accommodate mix of in-person and virtual participants
 - Have IT staff available until meeting successfully launches
- Highlight hybrid meetings on master schedule
 - Include Zoom link

Responding to on-site document requests

- Have key faculty and staff on stand-by
- Send document request description to faculty or staff
- Highlight responsive portions of documents received
- Provide document to Chair - in folder for Reviewer with name of reviewer and type of document on the outside - as soon as possible
- Retain a record of requests and responses

Questions?

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Cindy Chiarello, *University Planning and Accreditation*, James Madison University

Thank you, and good luck on your visit!!!