Preparing for Successful On-Site Committee Visits

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Introduction

• About Lincoln Memorial University (LMU)
  – Private regional liberal arts and professional studies University
• About the Presenter
  – President of Lincoln Memorial University
  – SACSCOC Committee experience

Six Types of Committee Visits

1. Substantive Change
2. Reaffirmation
3. Fifth-Year Review
4. Special Committee
5. Candidacy Committee
6. Initial Accreditation
Planning Strategically

Planning Strategically - an Overview

• Timelines and processes for preparing documents for submission prior to visit.
• Review of the strengths and weaknesses of the report submitted to SACSCOC.
• Accommodations for the Visiting Team.

Planning Strategically: an Overview (cont.)

• Agendas for the On-Site Visit.
• Preparing institutional constituents to participate in the visit.
• Preparing any additional documentation for the On-Site Committee to review on arrival or during the visit.
Considerations in Developing the Timeline for Preparing Documents

• Determine processes for submitting and reviewing drafts for each standard.
• Determine who has the information to address each standard.
• Assign responsibility for developing electronic and paper drafts of reports.
• Allow time for reflection on completed drafts of narrative responses and all supporting documentation.
• Schedule a review for consistency of information presented throughout the documents/standards.

Review of Report Submitted by the Institution

• Provides opportunity to conduct internal/external analysis of strengths and weaknesses of the submitted report.
• Develop strategies to strengthen the case for compliance with selected standards.
• Develop any necessary additional documentation and determine most appropriate methods for introducing improvements made prior to the visit.
• Plan to communicate evidence of improvements to the committee prior to, or during the visit.

Accommodations: Hotel

• Hotel with conference/meeting room and restaurant near the institution.
• The institution typically makes reservations and communicates accommodations to the Committee on the Information Outline for a Committee Visit Form.
• Environment—consider Committee members’ comfort and safety.
• Plan for technical support.
Accommodations: Meeting/Resource Room at the Hotel

- Provide hotel meeting/resource room available for committee on 24-hour hold during the visit.
- Set up meeting/resource room based on the Committee Chair’s directions.
- Include the following in the room: at least one copy of all reports and materials, computers for Visiting Committee Members, printer, internet access, shredder, copy machine, pens, pencils, highlighters, sticky notes, stapler, etc.

Accommodations: On-Site Meeting/Resource Room

- The Committee needs a meeting/resource room on campus (or at the teaching site) to conduct its work.
- The on-campus meeting/resource room should include copies of all reports and documentation.
- The on-campus meeting/resource room should include the same technology and office supplies as the hotel meeting/resource room.

Accommodations: Meeting/Resource Rooms at the Hotel and On Campus

When in doubt, ask the Chair.
Accommodations: Food

• The institution usually makes arrangements to provide meals for the Committee.
• The meeting/resource room(s) should have snacks and beverages.
• Where meals are served depends on the specific lodging and institution. Work with Committee Chair.
• The institution should provide snacks at locations where all interviews are scheduled.

Accommodations: Transportation

• The institution is responsible for getting Committee members to the hotel at the beginning of the visit.
• The institution is responsible for transportation from the hotel to the institution and back during the visit.
• The institution is usually responsible for transportation of Committee members to the airport at the conclusion of the visit.
• Talk to your Committee Chair!

Agendas for the Visit

• Typical activities during the visit
  1. Campus/Building Tour
  2. Document Review
  3. Class/Office Visits (optional)
  4. Extended Site Visits
  5. Individual and Group Interviews
  6. Allow time for Committee members to write their report
Agendas: Scheduling Interviews

- Depends on the interviewer’s direction and/or the number of interviewees.
  - For example,
    - Program Coordinators/Deans/Administrators: 1 to 1
    - Faculty: 1 to 1 or group
    - Current students in a class, individually, and/or in groups
  - Interviews are usually scheduled for 30-60 minutes depending on the number of people being interviewed and the standard(s) involved.

Agendas: Common Meetings

- Introduction of Campus Leadership/Overview of Institution. Include the President/CEO and members of the Leadership Team. Typically the first meeting on Campus.
- Meeting with a group of Trustees/Directors. Sometimes planned as a lunch meeting.
- Meeting with a group of Students. Sometimes planned as a lunch meeting.

Special Consideration for Lodging, Transportation, Meals, and Agenda Planning

- Be absolutely sure to consider any special requests or needs of Committee members in planning.
- This can be achieved by means of a Committee Member survey prior to the visit.
Preparing Institutional Constituencies
1. Board of Trustees/Directors
2. President
3. Provost/CAO
4. CFO
5. Deans
6. Faculty
7. Staff
8. Students

General Interview Tips
• Be honest
• Do not volunteer information on matters about which you are not fully informed
• Exhibit respect/cOLLegiality
• Avoid criticizing others
• Anticipate questions
• Display friendly demeanor

Preparing Institutional Constituencies: Strategies for Working with Small Groups
• Explain the accreditation process.
• Review narrative and documentation related to standards serving as basis for interview.
• Review developments related to compliance since submission of the most recent report (Focused Report/Documentation Template).
Preparing Institutional Constituencies:
Strategies for Working with Large Groups

• Faculty/Staff Conference Presentations
• Convocations
• Town Hall Meetings
• Presentations to Faculty during Academic School Meetings
• Presentation to Trustees
• Reaffirmation Website (QEP, Compliance Certification, Off-Site Committee Report, and Focus Report)

Preparing Institutional Constituencies:
Strategies for Working with Large Groups (cont.)

• Student/Faculty/Staff Email Campaigns
• QEP Logo Contest
• T-shirts
• Posters

Preparing All Institutional Constituencies:
Things to Review/Know before the Team Comes

• Report content and expectations embedded in the standards—do not address issues unrelated to the review.
• Anticipate what faculty, staff, administrators, and students will say.
An “Institutional Summary Form Prepared for Commission Reviews” is submitted for all types of Committee Visits.

- Faculty, staff and administrators should be familiar with the content of the form.
- The form provides a list of educational programs and degrees offered, type of governance control, a brief history, institutional characteristics, a list of off-campus sites and distance learning modalities, accreditation status with other agencies, and the institution’s relationship with the U.S. Department of Education.

Mock Visit

- Provides opportunity to utilize internal and/or external experts to prepare individuals/groups for interviews.
- Allows institutional constituents to become familiar with the interview format.
- Helps to identify key points for communicating compliance with standards.
- Helps individuals/groups plan strategies for presenting the most accurate and focused responses to potential questions.

Before the Visit

- Prepare individual schedules for each Committee member.
- Arrange for each Committee member to be assisted by an institutional representative (excellent opportunity to involve students).
- Practice demonstrations/presentations.
During the Visit

• Track schedule for each On-Site Committee member.
• Have staff available to contact institutional personnel when new interviews are requested.
• Determine method for delivering additional material requested for Committee review.

During the Visit (cont.)

• Brief and debrief individuals/groups interviewed.
• Be flexible and adjust schedules as necessary.
• Be prepared to work late if necessary, to address issues that arise.
• Have institutional leadership, clerical, and technology staff accessible at all times.

Essential Resources

• Resource Manual for The Principles of Accreditation
• Handbook for Institutions Seeking Reaffirmation
• Handbook for Review Committees
Questions or Comments?

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