What to Expect When You’re Expecting . . . the On-Site Visit
SACSCOC Annual Meeting
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2 - 3 years ahead . . .

Set a Budget!
Attend Orientation of Leadership Teams
(most recently at the SACSCOC Annual Meeting)
Submit Institutional Summary Form
Begin Writing Compliance Report

2 years to one year ahead . . .
Plan to go on an observation visit.

Ask your SACSCOC VP about going on a visit!

Assume you will not remember anything and take notes about the . . .

- College Workroom
- Hotel Workroom
- Compliance Questions
- Transportation
- QEP
- Schedule
- Interview requests
- Hospitality

Take pictures.
One year to nine months out . . .

Meet with key people who will be involved in the on-site visit to discuss the details of the visit. Take notes!
- President
- Vice-Presidents
- Events & Planning Coordinator
- Food Services Director
- Physical Plant Director
- Director of Student Affairs
- Assistants to all the people listed above.

As the details get filled in and tasks get done, send a monthly update.
Decide about Advisory Visit

- **Who?** SACSCOC VP and Institution’s Leadership Team
- **What?** Advisory Visit
- **Where?** Institution’s Campus
- **When?** It depends on the institution’s need (Up to 1 year ahead of time).
- **Why?** To receive experienced feedback ahead of the off-site or on-site visit.

*Choose a hotel for the on-site team

*If you live in a large city, you may want to do this a year ahead (or more). Reserve more than you think you need. We reserved twelve, but only needed ten.*
Bargain for special rates or freebies.

We will throw in an extra deluxe king suite for free!

Bargain with the Mary Kay Lady.
Rooms on Campus

1. Have a conference room for the team for the duration of the visit
   - Can be closed and locked
   - Has a nice "staging" area (want students here)
   - Can be used for the duration of the stay
   - Close to snacks and important facilities
   - Isolated and relatively private

Rooms on Campus Continued

2. "Showcase" room for meet and greet visit (with enough room for on-site team and campus team)
3. Several smaller rooms for small conferences with 3 – 4 individuals
4. At least two conference/board type rooms that will seat 4 – 10
5. "Showcase" room for lunch on second day
6. "Showcase" room for exit interview
7. Reserve rooms for an extra day at the beginning and at the end of the on-site visit for set-up and break-down.

Reserve more rooms on campus than you think you will need.
Reserve the golf cart!

Reserve the van and the driver.

Make sure the IT folks are committed.
Make sure someone from IT is willing to be:

- On campus,
- At the hotel,
- On call.

Give IT a list of needs just in case you need to reserve something in advance:

- laptops
- copiers
- shredders
- printers
- reams of paper
- extra toner
- wireless accessories
- et cetera

You need 2 of everything (hotel workroom and campus workroom).

QEP Advertising & Education

- Faculty Meetings
- BOT Meetings
- SGA Meetings
- Scheduled Campus Events
- TP
- First-year Cornerstone Class
- Harlem Shake
- Campus Signs and Table Tents
- Campus Newspaper
six to eight months out...

Repeat previous steps by following up on all reservations, ordering supplies, etc.
Invite local members of the Board of Trustees to participate.

Submit Compliance Report and Updated Institutional Summary Form.

- Track A – due in March (off-site review occurs in April)
- Track B – due in September (off-site review occurs in November)

Off-site report sent to institution

- We received this report the last week of November.
- If there are areas of non-compliance found, notify key people in the related areas that they may be asked to help write the focused report and/or attend an interview with the on-site team members.
- Notify all people in key positions on campus to be available for possible interviews during the on-site visit (Federal Requirements and those that are automatically reviewed in on-site visit).
two to three months out.

Repeat previous steps by following up on all reservations, ordering supplies, etc..

Now is the time for the CEO or Campus Liaison to contact your peer review team member chair to confirm the details of the visit. The chair may want to tour your campus, town, and check on accommodations.
Send the following items (by overnight mail) to the On-site Team Members Six to Eight Weeks Before the Visit:

- Institutional Summary Form Prepared for Commission Reviews
- Compliance Certification
- Catalog(s)
- Written response to Third Party comments (if applicable)
- Quality Enhancement Plan
- Focused Report (if one is prepared) to the Commission and to the On-Site Reaffirmation Committee members

Note: Much of the information on the previous slide (unless otherwise specified by SACSCOC) can be submitted electronically.

- Make it easy for the reviewers!
  - Pay attention to directions as to how to label thumb drives
  - Make sure you have directions so that the reviewers will know how to use the thumb drive to find your documents
  - Follow-up to make sure that all committee members received their materials

- At least three months out – Institution can nominate a person to serve as the Lead Evaluator of the QEP.
- About two months out - Complete Information Outline for a Committee Visit (Commission Staff will work with the institution to complete this two-page document.)
**Information Outline for a Committee Visit (sent by SACSCOC Staff to the Institution)**

- General information
- Transportation (nearest airport, transportation from hotel to airport, etc.)
- Reliable person to whom team members should send travel arrangements (flying, driving, arrival time, etc.)
- Housing accommodations
- Organizational Meeting and Exit Meeting time and place

**The person making travel arrangements should . . .**

- Coordinate airport pick-up with college employees (no taxi, shuttle, Uber, etc.),
- Give specific directions to both parties about where the team members should go for pick up,
- Have college employees and on-site team members swap phone numbers before the day of the flight,
- Have the team members picked up together, if the timing of flights permits.

Along with the information outline, we created and sent a form –

“COMMITTEE MEMBER SPECIAL ARRANGEMENTS.”
Put someone very dependable in charge of this!

Request information such as:

• Cell phone number
• Person to notify in case of emergency
• Dietary needs
• Special Physical Accommodations (for hotel and on campus)
• Laptop needed (then have two more on hand)
• Beverage and Snack preferences

Get the S.W.A.G. bags and personalize them!
What goes in the S.W.A.G. bags?

- Name Badge
- Luggage Tag
- Pens
- Pads
- Highlighters
- Pens
- Favorite Snacks & Mints
- Personalized Item
- Representative item from the institution
- Tissues
- Umbrella
- College Magazine, Map, etc.

Note on Information Outline for a Committee Visit Form: Institutions or individuals at institutions are not required to provide gifts to visiting committee members. If gifts are provided, they should be related only to institutional advertisement (i.e., mugs, paper weights, t-shirts, or the like). This guideline does not apply to snacks and sodas provided to committee members and commission staff.

Feeding the Team

Meals

- Prior to Day #1
  - Dinner meal for those arriving early
  - Snacks and beverages in goodie bags

- Day #1
  - Breakfast – hotel?
  - Catered lunch in the workroom at the hotel
  - Dinner meal at restaurant (up to the chair of on-site team)
  - Snacks and beverages available at meetings, in workroom, and everywhere!
• Day #2
  – Breakfast – hotel?
  – Lunch on campus (BOT or students)
  – Dinner meal at restaurant (up to the chair of on-site team)
  – Snacks and beverages available at meetings, in workroom, and everywhere!

• Day #3
  – Breakfast – hotel?
  – Coffee, beverages, and snacks available at exit interview

Have students available.
Choose the right students.
Educate the students.
• Send reminders to everyone in key positions.
  – IT
  – Food Service
  – Hotel Staff
  – College Employees

Draft the schedule, but be flexible.

Day Before – On-site team arrives and possibly visits other sites
Day 1: Investigate compliance issues from off-site report
Day 2: QEP review
Day 3: Exit Interview

It all depends on what the on-site team chair wants to do.
two weeks out . . .

- You will receive a list of interview requests from the on-site team chair.
- Set up the interviews with the appropriate people and determine a suitable location among the rooms you have already reserved.
- Print the interview schedule and send to all involved (time, location, escort name)
You will also receive a list of documents that the on-site team members would like to see.

- Track the documents and send them (before the visit, if possible).
- If not possible, have them available when the team members arrive at the hotel or on campus.

**Information Request**

For more information on how to locate all information prior to the visit:

1. Request to see June 30, 2012 Audit Report and the June 30, 2012 A & L Audit Report
   - Please see Attachment: Latrobe Financial Statements 2012 and 2011 A & L Financial Management Letter
2. Status report on current FY budget
   - Please see Attachment: FFY2011 budget update_121412
3. Status report on planning for next FY’s budget
   - Please see Attachment: FY2011 Budget Projections 121211
4. Request to review Home Plan
   - The Monongahela River is a large, broad-term system. The bond will be paid out by the City

**Finalize the Schedule**

**DAY THREE: Wednesday, March 20, 2013**

- Breakfast on your own
- 7:45 a.m. – 8:35 a.m.: Review draft report and exit conference details
  - Location: hotel workroom
- 8:30 a.m. – 9:00 a.m.: Committee travels to college
- 9:00 a.m. – 9:15 a.m.: Chair and SACSCOC Staff Member meets with President
  - Location: TBD
- 9:15 a.m.: Exit Conference – all committee members and college members
  - Hosted by President
  - Location: Bailey Room, Smith Hall
- 10:15 a.m.: Committee departs

**Gather materials for both conference rooms.**
ONE TO TWO DAYS OUT.

Stock both conference workrooms (should look identical).

Stock rooms with supplies.

- Bulletins and Handbooks
- Copies of anything requested by team members
- Copies of Compliance Report
- Copies of QEP Document
- Interview Schedules
- Printer
- Copier
- Shredder
- Wireless Accessories
- Laptops (for those who requested one)
- Personalized information cards including individual schedules, like this:
Arrival Day

- Ask hotel staff to put S.W.A.G. bags in each team member's room.
- Have a college employee or two to greet each team member upon arrival – at the airport AND at the hotel.
- When the chair of the team arrives, make sure he or she knows where the conference workroom is and who to get in touch with, if needed.
- Anyone for dinner?
- Is anyone missing a shaving kit?

During the Visit

- Have a staging area outside the on-site team's workroom, but far enough away to give the team their privacy.
- Have students or employees to escort the team members to their appointments.
- Have EVERYONE'S phone numbers for those unexpected last minute requests.
Have a way to quickly communicate with anyone and everyone involved.

Exit Interview

The institution’s President may extend an invitation to whoever he or she wants to attend the Exit Interview. Ask everyone who is invited to be on alert. When the team arrives on campus, the chair will meet with the President for just a few minutes and then the exit interview will begin shortly afterwards.

You can ask questions of the on-site team members!!!

This meeting could be very short!!!

Don’t forget!

The team will need to get back to the hotel and/or airport! Most will want to leave immediately after the exit interview.
Be prepared,

Be over prepared,

and be f l e x i b l e.

Also . . .

Prepare your mind to expect the unexpected

and remain calm if it occurs.

Quote from a College employee at 6:25 p.m. on Monday, March 18.

"The power is out and some of the SACSCOC team members cannot get in their hotel rooms because the room locks are not working. I'm still trying to find all the team members. We are supposed to meet in the lobby in five minutes to go to supper!"

If you have planned everything well, then you should only have to focus on addressing this newly discovered expectation.
Final Word:

Celebrate!

Questions?

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