
Site Visitor Manual

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Mission Statement

The mission of the CoARATE is to advance the quality of AT education through CAAHEP accreditation.

Vision Statement

CoARATE is recognized as the leader in evidence based standards for accreditation.

Core Values | CLARITY

- Commitment:** Dedication of time, talent and resources toward the achievement of CoARATE's mission.
- Leadership:** Inspiring others to advance the vision and goals of the CoARATE.
- Action-oriented:** Advancing the goals and projects of the CoARATE through timely, deliberate and thoughtful decision-making and effective implementation.
- Respect:** Honoring the perspective of any individual or organization.
- Integrity:** Carrying out the work of the CoARATE with honesty, professionalism and high ethical standards.
- Quality:** Consistently meeting or exceeding established standards and expectations in all CoARATE Activities.

Strategic Goals

GOAL #1

Developing a high level process for the collection and analysis of data for the purpose of improving AT Education

GOAL #2

Work within the profession and the guidelines of RESNA and other agencies supporting AT education.

GOAL #3

Position CoARATE to effectively respond to and manage trends in AT Education including developing competent evaluative processes especially for Distance Education.

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Key Websites

www.resna.org/coarate/standards.htm
CAAHEP Standards and the CoARATE Interpretations

www.resna.org/coarate/site_visits_visitors.htm
Site Visit Report
Site Visit Agenda

Introduction

The site visit is the most critical and complex aspect of the accreditation process. From the education program's perspective, it is also the most visible function of the Committee on Accreditation of Educational Programs for the Rehabilitation Engineering and Assistive Technology Education Professions (CoARATE).

The CoARATE is responsible for assuring that those engaged in the site visit are fully qualified and competent.

The site visit team must accurately and reliably collect, review, interpret, verify, and document all information pertaining to the education program. The accreditation recommendation made by the CoARATE to the Commission on Accreditation of Allied Health Education Programs (CAAHEP) depends upon the information gathered, and unless this information is accurate and fully documented, the Committee will find it difficult to reach a fair and objective decision concerning the education program.

Since the process of accreditation can be influenced by the performance of the site visit team, the following policies and procedures have been developed to ensure consistency and fairness. CoARATE's expectation is that delineating the responsibilities and skills of site visitors will assist those already engaged in the process in discharging their responsibilities and will provide the basis for educating new site visitors. Careful preparation and continuing improvement of the site visitation process and performance will increase the precision and consistency of the entire CAAHEP accreditation process.

The notations to the CAAHEP *Standards* that are identified throughout these Policies and Procedures refer to the current CAAHEP *Standards and Guidelines for the Accreditation of Educational Programs in the Rehabilitation Engineering and Assistive Technology Education Professions*.

Contact Us

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Section 1:

Site Visitor Qualifications & Requirements

Site visitors are instrumental in the peer review process. Site visitors are selected from the wide network of AT professionals.

Site visitors' intentions of interest are reviewed by the CoARATE Board of Directors for appointment.

Qualifications

Site visitors shall be approved by the executive of the CoARATE. Recommended qualifications may include some or all of the following:

Educator/Practitioner

1. possess a minimum of a Bachelor's Degree;
2. be knowledgeable in the subject matter taught;
3. have a minimum of three (3) years of related field experience, which includes a minimum of one (1) year of providing assistive technology services to clients; and
4. possess a professional registration, license, or certification.

Knowledge, Skills, and Sensitivities

The listing below provides a description of the general competencies expected of site visitors. No single site visitor can possibly be fully proficient in all the areas described; however, should strive to do so. The team approach utilized by the CoARATE assumes a complementary integration of the site visitor's knowledge and skills in such a manner that the team, as a whole, exhibits the required competencies.

Site visitors representing the CoARATE must exhibit in depth knowledge of the:

- Full scope of the education program's resources, operations and components as described in the Self Study Report prepared by the institution requesting the visitation.
- CAAHEP *Standards* and the CoARATE's *Interpretations of the CAAHEP Standards* applicable to the education program being evaluated. The CAAHEP *Standards* is the basis for the accreditation process and must ALWAYS be at the forefront. Programs are assessed **based on the CAAHEP Standards**.

The companion document, the CoARATE Interpretations, contains excerpts of the CAAHEP *Standards* with CoARATE interpretations adopted by CoARATE through policies. The interpretations are **NOT** part of the CAAHEP *Standards and Guidelines* document and are subject to change by CoARATE. Policy revisions

may occur often, so this document should be reviewed frequently to ensure the most current version. Refer to www.CoARATE.org/Standards.htm for the CAAHEP **Standards** and the most current interpretations.

Questions regarding the interpretations can be directed to the CoARATE Executive Office.

- Existing procedures for accreditation, including due process.

Accurate and complete on-site assessment requires site visitors have a general knowledge of:

- The principles of institutional organization/administration, including:
 - Institutional accreditation processes
 - Fiscal policy and planning
 - Various organizational/authority structures
- Curriculum design and instructional methods, including non-traditional approaches.
- Psychometric theory and application including:
 - Cognitive testing and evaluation, use of item analysis, appropriate cut scores, validity, and reliability
 - Performance evaluation, inter-rater reliability, and the use of survey results
- Contemporary standards of assistive technology, including current procedures and equipment, and the expected role of an AT professional
- Current learning resources related to the assistive technology education programs

Successful evaluation of educational programs for accreditation status requires the site visitor has the knowledge identified above and possess certain affective attributes described below.

The following represents a description of some basic attributes and sensitivities which the CoARATE Executive Committee believes to be essential qualities in a successful site visitor. Site visitors must have sensitivity to the:

- Concerns of those with an investment in the visitation process, including, but not limited to:
 - Privacy
 - Confidentiality of data
 - Politics of visitation and accreditation, including but not limited to:
 - Internal and external ramifications of adverse findings or decisions
 - Potential institutional or programmatic misuse of accreditation process
 - Sensitivity to the facilitative and consultative role expected from site visitors
 - Limitations of the responsibility and authority of site visitors
 - Values and philosophies differing from those of the site visitor
 - Potential for personal or professional bias
-

Training

Site visitors are required to actively participate in the CoARATE Site Visitor Workshop or participate on a site visit with a designated site visitor trainer. After the initial training, site visitors must complete periodic CoARATE updates to stay current with *Standards* interpretations, CoARATE policies, and AT education.

Appointment

Active

Upon approval by the CoARATE Executive Committee, a new site visitor will be paired with an experienced site visitor.

To remain an active site visitor, a site visitor must:

- Successfully complete any required Site Visitor Updates.
- Consistently achieve acceptable quality assurance reports.
- Attend any required continuing education (CE) sessions provided by the CoARATE (web-based, in-person, or other format) to ensure continuous compliance with CAAHEP *Standards*.
- Participate in a minimum of three (2) site visits in a 36-month period. (*based on demand*)
- Successfully complete the Site Visitor Training Workshop under current CAAHEP *Standards* or acceptable alternative as identified by the Site Visit Subcommittee.
- If retired and not currently working in a CAAHEP accredited program, has worked in AT education within the past five (5) years.

Site visitor status is subject to review biannually by the CoARATE Executive Committee and is based upon recommendations by the Site Visit Subcommittee. Reappointment recommendations will be based upon both the activity of the site visitor during the prior year(s) and assessment of the quality of their site visitor performance.

Withdrawal of Appointment

Individuals may be removed from the roster of active site visitors if any of the following occurs:

- Voluntary resignation.
- Failure to participate in a minimum of two site visits in a 36-month period. (*based on demand*)
- Conduct detrimental to or unbecoming of the CAAHEP accreditation process and the CoARATE.

The above is not a complete list of all the potential reasons a site visitor may have their appointment withdrawn. The CoARATE Executive Committee has the final decision as to what warrants withdrawal of the appointment.

Reappointment Following Absence

Individuals who have not met the site visit participation requirement, but would like to be reappointed, must submit a letter to the CoARATE Executive Office requesting consideration of reappointment. The letter must include an updated curriculum vitae and an explanation about what has changed to allow time to do visits.

Section 2:

Team Composition

A site visit team is comprised of at least two people.

Site visit teams usually consist of two (2) qualified members selected by the CoARATE Executive Committee from a list of site visitors appointed and approved by the CoARATE that same body. The team used during the initial accreditation visit are considered the “gold standard”.

Assignment Criteria

Based on site visitor availability and the level of experience, site visitors will be teamed together. An inexperienced site visitor will always go with an experienced site visitor.

1. No site visitor should have any real or perceived conflict of interest with the education program, faculty, or other assigned site visitor. If the assigned site visitor, Executive Director, the CoARATE Executive Committee, or the education program believes a conflict of interest may exist, the site visitor will be excused and another site visitor shall be selected.
2. Site visitors should not be assigned to education programs in the same state where the site visitor resides or works, or to education programs where professional relationships have been developed. Additionally, site visitors must not be assigned to locations which are substantially geographically close to the program even if they are in different jurisdictions.
3. All site visitors are required to acknowledge the Confidentiality Agreement. (The confidentiality agreement is emailed from the CoARATE Executive Office in advance of **every** site visit. The acknowledgement is returned via email to the CoARATE Executive Office. This is a reminder of the importance of the confidential nature of the site visit. **Confidentiality is paramount to the accreditation process.**

Team Captain

The team member having the most site visit experience is often designated as the Team Captain (TC). The Team Captain is responsible for:

- working with the program director to make a schedule for the visit;
- communicating the site visit team’s findings to the program personnel; and
- completing and submitting the Site Visit Report (SVR).

Additional Personnel

Site visitor trainees and/or observers may accompany the site visit team. Site visitor trainees are assigned by the CoARATE Executive Committee. Additionally, the Executive Director, or designee, may periodically audit site visits as part of the quality assurance process. Use of a CAAHEP Executive Committee appointee may be entertained during the startup phase of the CoARATE

Section 3:

Responsibilities

Responsibilities begin when a site visitor accepts the assignment and end when CAAHEP awards the final accreditation status to the program.

The CoARATE Executive Office, the site visitors, and the program work together to coordinate the site visit. The responsibilities described below are listed in the chronological order in which they are discharged prior to, during, and after the site visit.

Purpose of the Site Visit and the Site Visit Team

There are multiple steps in the accreditation process and the site visit is an important part of that process. Until CAAHEP makes the final accreditation action, however, no single part of the process, including the site visit, determines a program's compliance with the CAAHEP *Standards* or its accreditation status.

After the site visit is complete and the program has had an opportunity to respond to the site visit findings, the CoARATE Board will determine whether the potential *Standards* violations observed during the site visit constitute deficiencies within the program. The Executive CoARATE Committee will make a recommendation to CAAHEP based on all program materials, responses, the site visit findings, and remediation by the program. This also means that unbiased observation of the program by the site visit team, those individuals who actually "see" the program, is critical.

Before the Site Visit

The CoARATE Executive Office will match available site visitors with the program's site visit dates. Upon being selected for a site visit, the team members will confirm with the CoARATE Executive Office their willingness to participate.

A site visitor with a real or perceived conflict of interest with the education program to be evaluated must inform the CoARATE Executive Office and disqualify themselves immediately. The CoARATE Executive Office reserves the right to disqualify a site visitor based on a real, perceived, or potential conflict of interest. Prior to each site visit, the site visitor is required to acknowledge the Confidentiality Agreement which is sent in advanced of the site visit.

The CoARATE Executive Office should be notified at the earliest possible time if any emergency conflicts arise for the site visitors after assignment to a site visit and prior to the scheduled date(s) of the visit. Additionally, emergency contact information for the site visitor should be provided to the CoARATE Executive Office in case it is necessary to make contact while s/he is on a site visit.

Upon receipt of the program's Self Study Report (SSR) and the Executive Analysis (EA) (completed by the Executive Office), the site visit team members should review the documents in relation to the CAAHEP *Standards*.

1. Following review of the SSR and the EA, site visit team members should communicate with each other in order to identify concerns, outline specific areas for scrutiny, and develop strategies for data collection and evaluation. This collaboration should be done the evening before the site visit or earlier when possible.
2. When necessary, the site visit Team Captain should communicate with the education Program Director regarding questions about the SSR and supplementary materials the program should make available during the site visit.
3. Site visit team member(s) should communicate with the CoARATE Executive Office regarding any questions or concerns not clarified in (1) or (2) above.

Airline travel arrangements and hotel accommodations are typically made individually and submitted for reimbursement. When possible, the travel arrangements of the site visit team members should be coordinated.

Upon request by a site visitor, a site visitor may request in advance a check to cover hotel costs. This request should be made at least four (4) weeks before the site visit.

A per-diem will be promulgated as per the RESNA standards of the day. The site visitor must submit an expense report within 14 days of the site visit. CoARATE will reimburse within 14 days of receiving the expense report.

The education program should provide ground transportation for the site visit team to and from the airport and during the site visit. Site visit team members are responsible for confirming the ground transportation with the Program Director. A rental car or taxi, Uber, etc. may be used; however, requires preauthorization from the CoARATE Executive Director and the Program Director.

ALL modes of transportation to and from the host city airport and lodging accommodations must be coordinated with the Executive Office to ensure compliance with CoARATE Policies and Procedures.

Agenda

The site visit agenda should be arranged by the Program Director in consultation with the site visit Team Captain. The Program Director may choose to use the sample agenda located at www.CoARATE.org/site_visits_visitors.htm. When necessary, the agenda should be modified to ensure the relevant parties can be interviewed and pertinent data can be collected and verified. Final approval of the agenda is the responsibility of the Team Captain.

Site Visitor Conflict of Interest policy

(approved by the CoARATE Board, February 2013) states:

Site visitors should not be assigned to education programs in the same state where the site visitors resides or works or to education programs where professional relationships have been developed. Additionally, site visitors must not be assigned to locations that are geographically close to the program even if they are in different states.

The agenda will always begin with a meeting with the program director followed by the general group session. The agenda will always end with an informal meeting with the program followed by the exit summation with the administration and program personnel. The order of the other activities in between will vary based on availability of students, graduates, employers, faculty, and travel time to and from the clinical and field internship sites.

Key elements to scheduling the site visit include:

- Meeting with the Program Director** to review the site visit schedule and make any necessary adjustments.
- Hosting the Opening General Group Session** to inform the administration and program personnel about the purposes, function, and mechanics of the site visit and its relationship to the accreditation processes of the CoARATE and CAAHEP
- Interviewing students and reviewing student records and program files** on Day 1. Information collected during these formal activities often provide additional information to support the other activities of the site visit.

Everything in between may be arranged as necessary:

- Interviewing graduates, employers, faculty, Advisory Committee members
- Reviewing student records and program files
- Visiting clinical and field sites

The site visit will conclude with:

- Meeting informally with the Program Director**, which may include the Dean
- Providing an Exit Summation** with the administration and program personnel

Withdrawing from a Site Visit

A site visitor who withdraws from a scheduled site visit is responsible for expenses incurred prior to the withdrawal unless documentation of an emergency is provided.

Emergency is defined as:

- Personal or family illness or injury
- Death of an immediate family member
- Military assignment
- Jury duty
- Natural disaster

Preliminary Team Meeting

The site visitors should plan to meet with each other before the beginning of the site visit. At this meeting, the site visit team should review issues arising from the Self Study Report, the Executive Analysis, the agenda, and finalize the evaluative strategies.

During the Site Visit

Interview questions are the foundation of the site visit. Phrasing the question properly will elicit more information and accurate information.

The site visit is a dynamic and flexible process that is adapted to the type and size of the program reviewed and the completeness and clarity of the Self Study Report (SSR). A list of suggested questions has been developed for each of the groups or individuals that the site visitors interview. The questions serve as conversation starters, and are not meant to be verbatim questions, but rather topics to pursue. There is no correct or set order to the questions. The identified questions are by no means exhaustive. Some avenues may require more extensive investigation if deficiencies are suspected. The same questions are asked of several groups to verify the information and perceptions. For a complete list of questions and key talking points, visit www.CoARATE.org/site_visits_visitors.htm.

The use of open questions is encouraged, focusing less on one-word answers. Open-ended questions can produce facilitative responses and reduce the need for additional questions. Direct questions are appropriate, too, when the need is immediate information or the interviewee is rambling or being vague. Avoid “why” questions; this often puts the interviewee on the spot.

Initial Meeting with the Program Director

Fears and/or anxieties should be allayed, but no promises should be made regarding accreditation decisions. Site visit team members should remind the education Program Director that they are only gathering information and do not influence or make final accreditation recommendations.

This meeting is also a good opportunity to hear candid remarks from the Program Director as well as updates and any program changes that may have occurred since the SSR was originally submitted.

General Session with Program Officials

This session should include as many individuals as possible who are involved in the program, including administration, staff, and the medical director. Some of the following information will be a review for those closely involved with the process, but it is important to lay the appropriate groundwork.

1. Introduce the site visitors. Include names and titles. Backgrounds should include role in AT education, and/or service provision.
 2. Identify that you represent the CoARATE and CAAHEP.
 3. Define the purpose of your visit – to verify and clarify information relevant to the program. Emphasize that the program will be evaluated against the CAAHEP *Standards*. **You are not there to tell the program how you do it or how to do it in general.** Their program is not evaluated against your program. Make that clear.
 4. State that all the information that you gather, not otherwise public, will remain confidential.
 5. Emphasize that the site visit team does not recommend accreditation. The team is responsible for gathering information.
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6. Clarify that you are reviewing only the components of the Assistive Technology Program.
7. Explain you will review the control and quality improvement aspects of the system(s) in which the students are placed for field internship/practicum if applicable.
8. Discuss that in order to obtain an accurate reflection of the program, you need to interview students, graduates, employers, and clinical and field preceptors without the program director or faculty present.
9. Emphasize that the process is not only to gather information, but also to be consultative. The CAAHEP *Standards* provide minimum requirements.

Data Collection/Interpretation

The site visit team members should solicit, collect, verify, and interpret the information made available by the education program through interviews with faculty, preceptors, employers, program Advisory Board members, and administration. The role of the site visit team is to report on the education program's degree of compliance with the CAAHEP *Standards* by:

- Inspecting the pertinent facilities and resources.
- Reviewing and analyzing appropriate documentation and reports.
- Interviewing key education program personnel, medical director(s), support staff, students, graduates and representatives from the program's Advisory Committee.

Documentation & the Site Visit Report

The site visit team must carefully document all findings according to the outline provided in the Site Visit Report. The Site Visit Report is the communication to the CoARATE Board of Directors and CoARATE Executive Office detailing the findings of the site visit.

Some questions appear to relate to one another and are indeed asking for a different answer. Do not comment by writing "see above" or refer to a previously answered question. Even if you have to repeat part of an answer, it provides a better understanding for the CoARATE Board and the program staff who will read the report

- Evidence must be provided to substantiate all potential Standards violations and/or education program weaknesses. For example, if the Standard in question is identified as medical director does not "assure the competence of each graduate...", substantiation may consist of reference to statements made by the students or staff, to admission of non-participation by the physician(s) concerned, or the absence of any documentation signed by the medical director attesting to the competence of each student.
 - For all Standards "Not Met", references must be made to the Standard cited.
 - All Standards marked as "Not Met" must have a rationale as to why and how the site team determined that there was a potential Standards violation.
 - All questions posed in the Executive Analysis must be addressed and answered at the end of the Site Visit Report.
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Additional notes should be stated in the Site Visit Report further clarifying an issue or providing additional information on the program. The SVR is used to prepare the Findings Letter (FL) and is reviewed by the CoARATE Executive Committee when formulating its recommendation to CAAHEP. Additional information is encouraged that would provide a better snapshot of the program.

Editorials regarding your personal thoughts and feelings about the program are not allowed and may lead to problems when the CoARATE Executive Office has to address the program. Please refrain from including personal biases and reference to your own program while conducting the site visit and completing the report.

REMEMBER

- ✓ READ the Executive Analysis (EA) just like you read the ISSR/CSSR preparing for the site visit.
- ✓ Explain all "Not Met"
- ✓ Respond to ALL questions in the EA
- ✓ State why the program does NOT meet a Standard
- ✓ Leave an UNOFFICIAL copy with the program
- ✓ Email CoARATE Executive Office the Site Visit Report within 1 week of the site visit

Exit Summation

This session includes those individuals invited by the program, and may include administration, staff, and the program director. Provide an oral summary of the site visit team's assessment of the program's strengths, potential Standards violations, and suggestions for improvement.

1. Reemphasize
 - Site visit team maintains confidentiality of the information associated with the site visit not otherwise public
 - Program will receive a written report in the form of a Findings Letter and an official copy of the Site Visit Report
 - Program has been reviewed based on the CAAHEP *Standards*
 - Site visit team does **not** recommend accreditation status
 - Program will respond to CoARATE directly with written clarifications
 - Program will receive official notification from CAAHEP of CAAHEP's action.
2. Program will receive an online evaluation form from CoARATE to assess the site visit team and the CoARATE Executive Office
3. Present Strengths
4. Present Potential Standards violations
5. Present other Recommendations

An UNOFFICIAL copy of the SVR should be given to the program director at the conclusion of the site visit. If the site visitors are not able to complete the SVR before leaving, a copy of the summary page may be left at a minimum.

Under no circumstances are the site visit team members to indicate their personal views or predict programmatic results, CoARATE recommendations, or CAAHEP actions.

After the Site Visit

Following the site visit, team members are required to:

1. Submit via email the Site Visit Report within one (1) week of the conclusion of the site visit.
2. Submit the CoARATE Expense Report with all expense vouchers/receipts within two (2) weeks of the site visit completion directly to CoARATE's Executive Office. (The expense report is provided with the email confirming the site visit and at www.CoARATE.org/site_visits_visitors.htm.) Note:reimbursable expenses include per diem (meals) and travel (air, bus, rail), lodging, airport parking, mileage to home airport. ***The CoARATE will not reimburse expenses incurred by site visit team members if the expense report is submitted more than 30 days after the site visit.***
3. Communicate directly with the CoARATE Executive Committee Chair or key CoARATE staff person for site visits if there are concerns about a site visitor's performance.
4. Report to the CoARATE Executive Office any impropriety or unusual circumstance that could affect the validity of the site visit.
5. Submit the names of the program director to the CoARATE Executive Office if you recommend either as a potential site visitor.

Findings Letter

Upon receipt of the SVR, the CoARATE Executive Office will prepare the Findings Letter. The FL reflects the strengths, potential CAAHEP *Standards* violations, and recommendations of the site visit team. It is the basis for the program to confirm the factual accuracy of the report or to allege specific factual errors at the time of the site visit. In addition, the program may submit new documentation of corrective actions taken after the site visit.

A draft of the Findings Letter will be provided to the site visit team for review and comment prior to it being forwarded to the program. The site visit team will have up to one (1) week to review it. The final FL will be sent to the program and it will become part of the permanent and official record of the program, along with the Self Study Report, the Executive Analysis, the Site Visit Report, and the program's response to the Findings Letter.

Destruction of Materials policy

(approved by the CoARATE Board, August 2015) states:

Once there has been a final determination of the findings letter, the site team members and any other site visit participants who received materials from the CoARATE, shall destroy all materials and communications related to that site visit, such as: all documents received prior to visit, any emails pertaining to the visit, the unofficial and official team reports, and notes taken during visit. Destruction of materials requires deleting all electronic files and shredding of any paper documents received.

Site Visitor Checklist

Task	Responsibility	Due Date
Call PD to introduce self; provide background experience related to AT education; discuss agenda	TC	Within 5 days of receiving confirmation email w/ PD's contact info
Communicate with SV team regarding arrival and departure times; introduce self	TC	Within 10 days of receiving confirmation email w/ PD's contact info
Book Airline Ticket & Reserve Hotel	TC & TM	As soon as possible
Send Self Study Report, Executive Analysis, and travel expense voucher	Staff	4-6 weeks before site visit
Complete site visit agenda with PD	TC	2 weeks before site visit
Communicate w SV team about structure of SV, potential areas of concern	TC / TM	1 week before site visit
Communicate ground transportation arrangements to SV team	PD	1 week before site visit
Pack for Site Visit, including the: Executive Analysis – Self Study Report – Site Visit Report form – <i>Standards</i> .	SV Team	
Site Visit Takes Place		
Email Unofficial Site Visit Report to CoARATE	TC	Within 1 week of site visit
Mail Expense Report	TC & TM	Within 2 weeks of site visit
Draft & Review Findings Letter	Staff / SV Team	Within 4-6 weeks after receipt of SVR
Send Findings Letter & Official Site Visit Report to Program	Staff	Within 60 days of site visit
Complete Peer Evaluation	TC & TM	Within 45 days of site visit
Complete PSQ	PD & Dean	Within 45 days of site visit
Respond to the Findings Letter	PD	60 days before next CoARATE meeting (date will be identified in letter)

TM = Team Member
TC = Team Captain

PD = Program Director
Staff = CoARATE Executive Office Staff

SV = Site Visit
PSQ = Post Survey Questionnaire

Section 4:

Professionalism

Site visitors are the representatives of the CoARATE and CAAHEP; therefore, the behavior of the members of the site visit team will be interpreted as a direct reflection of the professional and ethical expectations held by the accrediting agency they represent. Although behavioral concerns arise infrequently, this issue has provided cause for questioning the accountability and credibility of the system. Careful adherence to the following principles of behavior should minimize such occurrences and strengthen the educational community's confidence in the accreditation process. In fact, just as in the evaluation of any AT educational program, appropriate affective behavior is of paramount importance to the practitioner. In your representation of the CoARATE and CAAHEP, the appropriateness of the affective behavior you portray is equally essential.

Dress Code

CoARATE's objective in establishing a formal work dress code is to enable our volunteers to project the professional image which is in keeping with the needs of our educational programs to trust us. Site visitors should project the image of a trustworthy, knowledgeable professional for the programs who seek accreditation and our consultative and facilitative services. This indicates, for example, jeans and sneakers are not appropriate attire.

Behavioral Concerns¹

There are a few cardinal rules for site visitors to AT education programs:

- **Do not tell them how you do it.** They really don't care. Moreover, you give the impression that you are evaluating their program against yours. You cannot do that.
- **Inspect all of the required areas;** cover all of the *CAAHEP Standards!* The process has no credibility if you indicate something is in substantial compliance and it has never been reviewed. The schedule leaves enough time to cover all areas.
- **If clinical or field internship areas are too numerous to visit each location,** the site visit team should select what **they** wish to see. Pre-selection by the program can stack the deck.
- **Explain you wish to interview students, graduates, and preceptors, without program faculty present.** You need candid information.
- **If a deficiency is suspected, verify it to your satisfaction.** Be thorough.
- **Don't inflict your pet RE/AT/OT/PT peeve on the program.** Just because you feel that a good AT education program must have "X" does not mean the program must have "X" if it is not a Standard.

¹ The behavioral concerns are adapted from "A Decalogue for the Accreditation Team," Hector Lee (COPA Agenda, February 5, 1976) and "Guidelines for CoAEMSP Site Visitors" Patricia Triff, RN, MA (CoAEMSP, May 2002)

- **Resist the temptation to tell them how to do it.** General suggestions and ideas on how to accomplish something may be appropriate to a point. However, advice tends to get confused with deficiencies; i.e., “We didn’t pass because we didn’t do it the way he/she said.”
 - **Be honest.** There should be no surprises in the final report. The contents of the report should be discussed at the exit summation.
 - **Read the Self Study Report.** The process lacks credibility if the site visitors are unfamiliar with the materials. The program has put a great deal of effort into preparing the Self Study Report. Be familiar with it.
 - **Conflicts of interest must be avoided.** Site visitors must decline any assignment in which a real or potential conflict of interest may be perceived. This includes assignment to programs in which former associates, former students or relatives are employed, or institutions where the site visitor has been employed or has a competitive relationship. Site visitors will not be assigned to programs in the same state where the site visitor resides or works or to programs where professional relationships have been developed.

Site visitors should immediately disqualify themselves if at any time in the past they have served as a consultant to the program or the sponsor. A conflict of interest may also arise when a clear disparity in the values, philosophies, or orientations of the program and the site visitor would make an objective evaluation difficult or impossible.
 - **Confidentiality must be maintained.** The process of accreditation is credible only to the extent that site visitors recognize, respect, and maintain the confidentiality of all information obtained during the visitation process that is not otherwise public.
 - **Undue influence (or its appearance) must be avoided.** Site visitors should not accept favors, services, gifts, or gratuities from the institution or program being visited. When hospitality is offered for the convenience of the site visit team, good judgment and common sense should determine its limits.
 - **Imposition of values, philosophies, or methods must be avoided.** Judgment of education program quality and suggestions for improvement must be based upon the CAAHEP *Standards*. Site visitors must not impose personal preferences or ideals upon program personnel or suggest that an institution adopt measures likely to be altered or reversed by subsequent CoARATE Board action.
 - **Avoid becoming an informer.** Site visitors often uncover what they believe to be hidden tensions or conflicts between the parties with a vested interest in the program’s operations or reputation. Inappropriately alerting education program personnel, or administrative officials of suspected impropriety or potential conflicts may be perceived as provocation and must be avoided.
 - **Do not allow reputation to influence judgments.** Site visitors in awe of a program’s reputation or its personnel may be reluctant to criticize obvious deficiencies. Overlooking such weaknesses is not only inappropriate, but may give the institution a false impression concerning the quality of its program and minimize easily fixed but real problems.
 - **Avoid unwarranted optimism or sentimental generosity.** Do not be tempted to minimize programmatic deficiencies when the program is doing its best to meet the *Standards*. Failure to acknowledge and report all deficiencies can mislead program
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officials, jeopardize students' rights to a quality education, and ultimately call into question the credibility of the accreditation process.

- **Responsibility and authority should not be abused.** The site visitors may find that a marginal program is vulnerable. Do not misuse the power of the accreditation process to destroy a program that may only need help.
- **Dwelling on trivial concerns is counterproductive.** Site visitors often discover small problems that can be solved by attention to minor details. Avoid blowing such trivial concerns out of proportion. Often simple verbal consultation or discussion is all that is needed to correct these problems.
- **Recruitment of program personnel is inappropriate.** Site visitors often find personnel they would like to recruit for their own institutions. Never take advantage of the opportunity afforded by your position as a site visitor to lure good faculty members away from the program being visited.
- **Avoid solicitation.** Site visitors might see the opportunity to suggest themselves for consultation, a temporary job, or a permanent position with the institution or program they are visiting. The CoARATE does not approve solicitation of site visitors to be employed by the program nor for site visitors to use the site visit as a means of job-hunting.

Site Visitor Gift policy

(approved by the CoARATE Executive Committee, July 2016) states:

Site visitors can graciously accept program gifts up to a monetary value of approximately \$25. Gifts that appear to be over \$25 should be graciously returned to program with apologies concerning CoARATE site visitor policies.

Site Visitor Consulting policy *(approved by the CoARATE Executive Committee, July 2016) states:*

Consultation by non-board member site visitors - either paid or unpaid - is not specifically prohibited by the CoARATE. The practice of consulting is at the sole discretion of the individual doing the consultation and is considered outside of the CoARATE/CAAHEP accreditation process. Site Visitors cannot visit the program as CoARATE representatives of which they have consulted at any time. Consultation with programs which he or she has visited as a site visitor is also contra-indicated.

Section 5:

Quality Assurance

Quality assurance is critical to the success of the accreditation process. Site visitors are evaluated by their team member, themselves, the Program Director, the Dean or comparable administrator, and the CoARATE Executive Staff.

The CoARATE Board believes improvement in the quality and consistency of site visits for accreditation is contingent upon the continued development of the site visitor competencies described herein. The CoARATE believes that such development is dependent upon the objective evaluation of the performance and behavior exhibited by its site visitors as they perform their important responsibilities. Only by employing an evaluation system can the CoARATE Board discern strengths and limitations in the site visit process and provide the educational community it serves with the assurance of its own responsiveness and accountability.

For these reasons, the CoARATE Board of Directors has established the following processes regarding site visit assessment:

Components of Evaluation

Education Program Staff

Following the site visit, the Program Director and Dean or equivalent, are asked by the CoARATE Executive Office to complete an evaluation using an objective rating scale assessing the knowledge, skills, sensitivities, and behavior (as described herein) of the site visit team. Evaluation of site visit team members is completed independently by the program director and the dean or representative. Oral reports may also be solicited.

CoARATE Evaluation

The Executive Committee evaluates the completeness of the Site Visit Report, including: submitting it in a timely manner, responding to all questions posed in the Executive Analysis, listing all potential *Standards* violations accurately and all the strengths on the Summary page; responding to the Findings Letter draft in a timely manner; and communicating with the CoARATE interested parties.

Randomly the CoARATE Executive Committee or Sub-Committee will call site visitors to conduct a follow-up of the site visit.

Compilation of Evaluations

The data obtained by the evaluation mechanisms described will be analyzed to determine general areas of strengths and limitations and to detect general trends. Such data will provide the basis for planning subsequent education workshops for new and active site visitors.

Semi-annually the CoARATE Executive Board evaluates the performance of the site visitors to recommend to additions to and deletions from the list of active site visitors.
