



Senior College and
University Commission

Visit Process Guide

Revised August 2023

Preparing for and Conducting a Visit

Information for the ALO

for

Seeking Accreditation Visits
Accreditation Visits for Reaffirmation
Thematic Pathway for Reaffirmation
Special Visits

August 2023

Table of Contents

Part I. Before the Visit	4
Scope of This Guide	4
Types of Visits and Visit Process	4
Seeking Accreditation	4
Reaffirmation Process.....	4
Special Visits	4
Reports from Institutions for Visits	5
ALO Role	5
WSCUC Staff Roles	5
Visit Terms and Dates	6
The Team	6
Team Selection and Appointment Process.....	6
Team Roster	7
Role of the Team Chair.....	8
Role of the Assistant Chair.....	8
Role of the WSCUC Staff Liaison	9
Timeline for the Visit Process	10
Materials Provided by WSCUC	10
Materials Provided to the Team.....	10
Materials Provided to the ALO	10
Initial Communications About the Visit	10
Planning the Visit	11
Logistics Survey	11
Visit Schedule	11
Call with Team Chair and CEO.....	13
Confidential Email Account	14
Technology Resources	14
Team Meals and Special Dietary Needs.....	14
Token Gifts of Appreciation.....	15
Hotel.....	15
Transportation	15
Team Room	16
Visit Information to the Campus Community	17
Off-Campus Locations and Distance Education Programs	17

Team Review of Off-Campus Locations	17
Team Review of Institutions Offering Distance Education	18
Onsite Review of Institutions which are Completely Online.....	188
Part II. During the Visit	20
Resources and Support for the Team	20
Understanding Team Strategies	20
Audits	20
Focused interviews	20
Document reviews.....	20
Reviews of evidence of student learning.....	20
Part III. After the Visit.....	22
Communications After the Visit	22
Team Report.....	22
Draft Team Report.....	22
Final Team Report and Institutional Response.....	23
Commission Meeting and Action Letter	23
Schedule for The Commission Meeting	23
Protocol During the Commission Meeting	24
Commission Action Letter	24
Publication of Commission Actions	24
Follow-Up Meetings with WSCUC	25
Expenses, Fees and Billing Procedures	25

Part I. Before the Visit

Scope of This Guide

This guide primarily describes the travel logistics and interactions between WSCUC and institutions during site visits that take place on the institutional campus. While the travel logistics do not apply to remote visits such as Offsite Reviews or remote Special Visits, the pre-visit preparations and interactions with the institution during the visit are relevant to all reviews and may vary by visit type. Please see Tips for Teams for Conducting Remote Reviews Guide.

Types of Visits and Visit Process

WSCUC conducts accreditation visits for the purposes of determining readiness to be granted initial accreditation, to reaffirm accreditation, or to review specific issues that relate to accreditation.

Seeking Accreditation

Institutions that have been granted eligibility and have applied for accreditation are scheduled to have a Seeking Accreditation Visit (SAV). Following the visit, the Commission decides whether to continue eligibility, grant candidacy or grant initial accreditation; the Commission can also decide to defer or deny candidacy or initial accreditation.

If eligibility is continued or candidacy is granted, a further Seeking Accreditation Visit will take place. If initial accreditation is granted, the institution is moved into the reaffirmation process.

Reaffirmation Process

There are two types of reaffirmation: the typical two-stage process for most institutions called the Institutional Review Process (IRP) and an alternative approach offered to a smaller number of institutions that meet specific criteria called the Thematic Pathway for Reaffirmation.

Institutional Review Process (IRP)

Reaffirmation of accreditation is a two-stage process consisting of an Offsite Review (OSR) held via videoconferencing by the team, followed by an Accreditation Visit (AV) on the campus one semester later.

Thematic Pathway for Reaffirmation (TPR)

Institutions that meet certain criteria are selected by the Commission for the TPR. In the TPR, institutions provide evidence of compliance with WSCUC Standards and federal requirements and address one or more self-selected themes.

Special Visits

Special visits may be scheduled by the Commission in addition to other accreditation visits, to follow up on issues of concern. The scope of these visits is detailed in the Commission Action Letter. However, if the review team learns of other material issues during the visit, it has the authority to explore them. Special Visits are typically conducted on site at the institution; however, the WSCUC staff liaison may determine based on the findings of the Commission that the Special Visit may be conducted remotely.

Reports from Institutions for Visits

In preparation for accreditation reviews, institutions are required to submit a report ten weeks before each Seeking Accreditation Visit, Special Visit, Offsite Review or Thematic Pathway for Reaffirmation Visit. A separate report is not required for Accreditation Visits, although the institution may be asked to submit additional documents after the Offsite Review. When possible, all documents should be submitted electronically using WSCUC's cloud server.

Institutions should consult with their WSCUC staff liaison about the report and follow the appropriate guidelines (available on the WSCUC website), as follows:

- Seeking Accreditation Visit: How to Become Accredited
- Special Visit: Special Visit Institutional Report Guide
- Reaffirmation: Handbook of Accreditation
- Thematic Pathway for Reaffirmation (TPR) Guide

The institutional reports are submitted by uploading them to a cloud server, specified by WSCUC. Before the report is due, the ALO is provided with upload instructions and the web address for the location to which the report is to be uploaded. Once uploaded, the report is shared with the review team. After completion of the review, access by the ALO and the team is removed and the report will be filed in WSCUC's permanent online files.

ALO Role

The primary contact between WSCUC and the institution for all matters is with the Accreditation Liaison Officer (ALO) of record. This also applies to the review process. If someone other than the ALO is responsible for overseeing the visit, the ALO is responsible for keeping that person updated and forwarding any information sent to the ALO by WSCUC. Team members serving on reviews will also communicate with the ALO on matters related to individual travel logistics. The WSCUC team Assistant Chair (AC) and the WSCUC staff liaison are responsible for ensuring all the necessary visit arrangements are in place as described in this Guide.

WSCUC Staff Roles

Each institution is assigned a WSCUC staff liaison, and this is the person with whom the ALO primarily deals in all matters related to accreditation. The staff liaison is normally a Vice President (VP) or other senior WSCUC executive who holds that institution in their portfolio of institutions. At times, due to calendar conflicts, another VP may substitute for the staff liaison and be assigned responsibility for a particular visit. If this is the case, the ALO should communicate with the assigned visit liaison on matters related to the visit and with the assigned staff liaison on other matters.

The role of the liaison during the visit process is described in more detail in this section under the heading 'Roles of the Team Chair, Assistant Chair and WSCUC Staff Liaison.'

The WSCUC Visit Process Manager schedules the dates for reviews and visits, invites people to serve on teams, sends the final team roster to the institution's CEO and ALO, provides the team members and the ALO with preparation materials for the visit, collects documents from the team after the visit, sends the institution the final team report, and receives the institution's response to the team report if provided.

Visit Terms and Dates

WSCUC ordinarily conducts reviews and visits in fall (September through early December) and spring (late January through early April.) No reviews or visits are scheduled during the weeks when the WSCUC Commission meets (normally late February and June and early November) or during the week of the WSCUC Academic Resource Conference (ARC) in April each year.

Institutions that have been granted eligibility will schedule the term of their first visit in consultation with their staff liaison. Otherwise, institutions are normally advised of the terms of future reviews in a Commission action letter. Visits are normally scheduled over three days, with the team spending two full days on campus and holding an exit meeting on the morning of the third day, departing the campus by noon. The team has some flexibility in setting the starting and ending time of visits, depending on the nature of the visit and the size of the institution. Special visits are limited in scope and may be shorter. Teams generally meet in executive session at around 4:00 pm at the team hotel on the day before the site visit starts.

Teams may also schedule additional days in advance of the campus visit to evaluate off-campus sites. These additional dates are arranged between the staff liaison, the team, and the ALO.

The Visit Process Manager at WSCUC initiates the date scheduling process by emailing proposed dates to the CEO and ALO of the institution. For reaffirmation reviews, dates are proposed for both the OSR and AV at the same time.

The CEO should respond to the proposed dates as soon as possible and suggest alternative dates if the proposed dates are not suitable.

- For OSRs, the CEO and other select key personnel (e.g., ALO, CAO, CFO, Board Chair) must be available on the afternoon of the review date to meet via videoconference call with the team.
- For campus visits (SAVs, AVs, TPRs, and SVs), the institution should be sure that administrators and faculty will be available, students will be in classes, and holidays and previously scheduled campus activities will not conflict with the work of the team on the visit. The CEO should plan to be on campus and available throughout the visit.

Alternative dates may have to be negotiated later once WSCUC begins to invite team members, to suit the schedules of those being invited, and institutions should be open to this possibility and have some back-up dates in mind.

Institutions will also be given the due date for their institutional reports when the visit dates are scheduled, as well as the dates for the Commission Meeting that follows the visit. CEOs are asked to block these Commission dates in their calendars as well as the visit dates.

The Team

Team Selection and Appointment Process

Visit teams ordinarily consist of four to seven members. With the exception of large or complex institutions, comprehensive review teams typically consist of five members. Special Visit teams can be smaller, depending on the nature and scope of the issues under review. For all visits, one member serves as the team chair, and another member is designated as the assistant chair. Team selection commences once the visit dates have been scheduled with the institution.

WSCUC seeks to compose teams with a balance of backgrounds and experience and the expertise to understand the nature, mission, and context of the institution being reviewed, and to address the issues and challenges facing the institution. Team members are sought who have broad experience in higher education and perspectives that extend beyond their own institution and institutional type. Factors considered in composing a team include:

- Role within the home institution (e.g., administrator, faculty member, trustee)
- Type of institution represented (e.g., public, non-profit, undergraduate, graduate, professional or faith-based)
- Academic credentials and experience
- Expertise in a relevant discipline
- Expertise in relevant aspects of the Standards, themes, and areas that will be addressed on the visit (e.g., diversity/equity/inclusion (DEI), planning, finances, governance, assessment of student learning, learning resources, student services, general education, faculty matters, online delivery and off-campus locations)
- Balance of experienced and new evaluators
- For Special Visits, team members are selected based on their expertise in the areas of focus for the visit.

For reaffirmation reviews, the team members are asked to commit to serving on both the Offsite Review and Accreditation Visit, although some changes may be made to the team after the Offsite Review. If an institution has more than one Seeking Accreditation Visit, some team members may also be asked back from the previous visit to provide continuity.

Team members are required to participate in training that covers WSCUC Standards, policies, processes, and visit protocol, and are provided with resources related to these areas. Information about the interactive online training module is sent to team members well ahead of the visit.

The WSCUC Policy on Conflicts of Interest prohibits individuals from serving on a team reviewing an institution with which they have a pre-existing relationship that could give rise to a conflict of interest, such as employment, application for employment, close relative working in the institution, or a consulting relationship. Individuals are expected to inform WSCUC if they have or have had such a relationship and to decline service on the team. The full statement of this policy is available on the WSCUC website. All team members are asked to sign a statement concerning conflict of interest Standards of Ethical Conduct once they have accepted an invitation.

Team Roster

Once all the team members have been identified, the Visit Process Manager sends the team roster and biographies of each evaluator to the CEO and the ALO. The institution is asked to review the roster and to identify any team member who it believes may have a conflict that would preclude service on the team. The only matters that preclude appointment to serve on a team are set forth in the WSCUC policy on conflict of interest, as discussed above. The ALO should consult with the WSCUC staff liaison if the institution has any such concerns. The Commission reserves the right to determine the final team composition.

Late changes may need to be made to a team due to unforeseen withdrawal of a team member, and WSCUC will advise the institution of the change and send an updated roster as soon as a replacement has been appointed.

Role of the Team Chair

The team chair is usually a president/CEO, provost, or vice president, often from an institution that is similar in size and/or mission to the institution being reviewed or was previously with a similar institution. The team chair guides the work of the team, drafts sections of the report, and has overall responsibility to see that the team assesses the institution's responsiveness to concerns of the Commission and previous teams, evaluates the institution fairly and rigorously considering the Standards, and ensures that the team report that gives the Commission a clear basis on which to make its decision about the institution's accreditation.

To carry out this charge, the team chair:

- Ensures that the visit is conducted in a professional and courteous manner and handles any problems that arise during the visit
- Communicates with the institution on behalf of the team, establishing a relationship with key representatives of the institution, especially the CEO, and setting the tone for the visit
- Coordinates logistics with the team, including holding a pre-visit team conference call, and setting assignments for team members in consultation with the Assistant Chair (AC) and staff liaison
- Serves as coach and mentor to the team, answering questions, elaborating responsibilities, clarifying accreditation issues, explaining options for the team recommendation, and building a coherent and motivated team
- Drafts sections of the report
- Focuses the review on the examination and analysis of evidence, on the issues identified by the institution as the foci of the review, and on the Standards
- Facilitates the identification of key issues and questions
- Leads discussions with the team in executive session
- Starts and facilitates key meetings and interviews during the visit, such as the meetings with the CEO and governing board
- Meets privately with the CEO prior to the exit meeting to inform the CEO about key recommendations that the team will make in its report
- Finalizes the team report and sends it to the CEO and ALO for factual corrections
- Sends the final report and confidential team recommendation to the WSCUC office and is present, usually by phone, at the Commission meeting to answer the Commission's questions about the visit and report

Role of the Assistant Chair

Assistant chairs are selected for their accreditation experience and strong organizational and writing skills. The assistant chair provides key support to the team chair in developing the framework and strategies for the review and preparing the first draft of the team report. Specifically, the assistant chair:

- Works with the chair on the organization and structure for the visit, including team assignments, lines of inquiry and visit strategies
- Adjusts the visit schedule with the ALO
- Works with the ALO on the overall logistics of the visit to ensure that visit process details as

described in this Guide are implemented successfully

- Compiles team worksheets into one document in advance of the team's pre-visit team conference call
- Encourages the team to begin drafting preliminary sections of the report prior to the visit
- Records team observations, agreements, and decisions during the team conference call, including visit schedule revisions and additional materials needed
- Maintains notes of team meetings during the visit
- Drafts the introductory and other sections of the team report as agreed upon and compiles the outline and draft of the team's preliminary report sections before the visit
- Facilitates the drafting of team commendations and recommendations in advance of the exit meeting
- Checks the confidential email account and in consultation with the WSCUC staff liaison and team chair shares salient communications made to the account with the team members by displaying the message on a screen, reading the message aloud, or providing team members login information to review the messages. Confidential email messages may not be shared via email.
- Completes the first draft of the team report, integrating the drafts of the sections provided by the team members
- Ensures that appendices, such as the federal compliance forms and reports of off-campus locations and distance education, are attached to the draft report
- Ensures that the team understands the report writing deadlines after the visit.
- Assists the team chair with final edits to the report.

Role of the WSCUC Staff Liaison

The staff liaison works closely with the institution, usually through the ALO, on an ongoing basis, supporting the institution with all aspects of accreditation. The staff liaison also serves as the conduit for communication from the Commission to the institution. The staff liaison is familiar with the institution and with the institution's history and its focus for the upcoming review.

As noted above, at times, due to heavy visit loads or scheduling conflicts, another WSCUC VP will be assigned as the visit liaison for a particular visit (or for the OSR).

During the visit process, the assigned WSCUC liaison:

- Provides guidance to team members during the pre-visit team conference call
- Responds to questions from the institutional representatives, usually through the ALO
- Responds to questions from the team chair, assistant chair, and team members
- Works with team members on team organization, assignments, visit methods, and strategies
- Serves as a resource to the team throughout the review process
- Works to ensure that the team stays on task during the visit and, in particular, encourages efficiency so that the team does not have to work in group session beyond 9:00 pm on any of the evenings
- Accompanies the team starting with the initial team meeting
- Makes suggestions to the team on the first draft of the team report
- Reviews the confidential email account
- Recommends WSCUC policies and guides that pertain to issues the team is exploring
- Conveys the team report and the confidential team recommendation to the Commission
- Makes a staff recommendation to the Commission

- Attends the Commission meeting, at which the Commission takes action on the institution, for the purpose of answering questions about the review

Timeline for the Visit Process

The planning for the visit accelerates about twelve weeks before the visit begins. The Visit Process Manager prepares a timeline for the visit and sends it to the ALO with other materials that will help the ALO get started with planning. The timeline has target dates for all activities and should be used by the ALO to calendar the tasks that must be undertaken as the visit nears.

Materials Provided by WSCUC

About ten to twelve weeks before the site visit, WSCUC provides both the ALO and the team with links to separate folders in an online document management system that holds the materials needed for each party to prepare for the visit.

Materials Provided to the Team

- The institutional report for the visit
- The institution's letter of intent to apply for initial accreditation, if the institution is still in eligibility
- The institution's accreditation history, which lists each Commission action pertaining to the institution's accreditation
- The most recent Commission action letter (or staff transmittal letter) and visiting team report
- Key Indicators Dashboard (KID) containing trend data, peer comparison data and benchmarking to national and WSCUC averages
- Other reports and correspondence, such as action letters about eligibility, substantive change actions, interim reports, where relevant
- The team roster and biographical information for each team member
- The timeline for the visit process
- Expense voucher to request reimbursement from WSCUC for expenses relating to the visit, and the WSCUC Business and Travel Expense Policy.

Materials Provided to the ALO

- The team roster and team biographical information
- The timeline for the visit process
- The visit logistics survey that the ALO will send to the staff liaison and the team members
- A sample notice to be sent by the ALO to the entire campus community concerning the visit and the confidential email account
- A visit schedule template for planning and preparing a draft agenda for the visit
- Information about WSCUC's Key Indicators Dashboard (KID)

Initial Communications About the Visit

The WSCUC staff liaison establishes communications with the team members in the three months before the visit. During this time, the team has at least one pre-visit conference call, and team members study the entire report and begin a deep analysis of the area(s) assigned to them.

The WSCUC staff liaison and ALO usually communicate at this stage of the process to discuss the ALO's responsibilities for making logistical arrangements for the visit, including hotel reservations, conference room reservations for team meetings, transportation, and equipment for the team. The ALO is asked to develop a draft list of key individuals and groups for the team to meet, including members of the

governing board, faculty, administration and staff, and students. (See below regarding visit schedule for more information about the people and groups with whom the team typically meets). The start and end times of the visit are confirmed. Additional activities, such as visits to off-campus locations, review of online programs, and the follow-up on any outstanding substantive change-related matters, are discussed. During this initial call, a tentative date may be set for the pre-visit conversation with the CEO.

Planning the Visit

Logistics Survey

WSCUC provides the ALO with a logistics survey template. The ALO emails this to each team member about six or seven weeks before the visit.

The form provides the team with details about the most convenient airport, the hotel that will be used, and transportation available to/from the hotel and campus, etc. The form also has questions about the team members' travel plans, hotel room and dietary requirements and preferences, handicap access needs, etc. The ALO can add or change questions as needed.

Team members are asked to return this logistics form directly to the ALO, not to WSCUC.

Visit Schedule

At or about the same time, the ALO sends the chair and assistant chair a draft visit schedule, including the opening and closing meetings and a list of suggested individuals and groups with whom the team may wish to meet. The team will discuss this during its pre-visit conference call, usually held five or six weeks before the visit. On this call, the team identifies additional documents that it may need and refines the draft visit schedule. This information is passed along to the ALO as soon as possible after the call by the Assistant Chair. Where possible, all additional documentation should be provided electronically through WSCUC's cloud server. The team makes the final determination on whom they will meet with during the visit.

The details of schedules vary substantially from visit to visit, depending on the kind of visit being made, the issues that the team must address, and the nature, size, and complexity of the institution.

The team attends opening, closing, and other important meetings as a group, but team members spend time on their own or in smaller groups in meetings relating to areas assigned to them and in the team room reviewing evidence.

The following is a basic chronology of the meetings and activities that the ALO will schedule, with a brief explanation of the purpose of each meeting. The ALO does not generally attend the meetings unless he or she is a key member of the group, e.g., the accreditation planning committee or the President's cabinet.

Initial team meeting: This meeting is usually held at 4:00 pm the afternoon before the visit, at the hotel where the team is staying, and continues through a team dinner which typically takes place at a local restaurant. The ALO will make the dinner reservation in consultation with the AC and/or the WSCUC staff liaison. The WSCUC staff liaison assists with team orientation and answers team members' questions about Standards, policies, and processes. Team members review assignments and refine their plans and strategies for conducting the visit. The ALO secures a team room for the duration of the visit at the hotel

for this meeting and other team meetings e.g., a conference room at the hotel with a standard business conference table that has ample space for six or seven persons including their laptops and other materials.

Meeting with ALO: The team meets with the ALO in the team room as soon as it arrives on campus for the first day of the visit. The team will discuss final logistical arrangements and the organization of the visit with the ALO. Sometimes, last-minute adjustments need to be made to the schedule, though every effort is made to keep these to a minimum. The ALO reviews the schedule with the team and provides updates and an overview of the documents and resources available in the team room and elsewhere on campus. The ALO assists the team in getting internet access and access to a printer located in the team room.

Meetings with the CEO: An initial meeting with the CEO and/or senior leadership is usually held just after the meeting with the ALO on the first full day that the team is on campus. This meeting is held to welcome the team, to introduce key individuals, and to give the CEO a chance to set the tone for the visit and highlight important institutional accomplishments, priorities, initiatives, and challenges.

Meeting with the governing board or system head: Ordinarily, the team meets with members of the governing board of the institution. At the Chair's discretion, a meeting with the governing board may be optional on Special Visits if governance is not an identified issue. If the institution being reviewed is part of a multi-campus public or private system (such as the California State University), the chair may arrange for and hold a conference call with the head of the system office and/or members of the system governing board. The CEO and other members of the administration, faculty, and staff do not participate in the governing board meeting or on the call with the system head.

Meetings with the accreditation committee: Early in the visit, the team meets with the committee or group that is responsible for overseeing the WSCUC review process, preparing the report, etc. to talk about the WSCUC process on the campus and to answer questions from the team about how the process worked.

Meetings with faculty, administrators, staff, and committees: Meetings should be scheduled with institutional representatives such as provosts, vice presidents, deans, faculty leaders, librarians, student services personnel, financial and technology personnel, and others whose knowledge and involvement align with the team's lines of inquiry and/or issues framing the review and, therefore, can help facilitate the team's review. The team usually splits up to attend these meetings in pairs; hence, more than one meeting can be scheduled at the same time.

Open meetings with faculty, staff and students: Separate meetings are held with each of these constituent groups. The ALO informs the campus well in advance and invites everyone in the campus community to attend. They should be scheduled at times when constituents are most available. Email and text reminders, posters, and announcements in meetings and classes are helpful in getting good attendance at the open meetings.

The team chair may also ask the ALO to schedule meetings with smaller groups of six to eight persons, such as faculty members or students. For example, these sessions might be held with non-tenured faculty, adjunct faculty, or faculty of specific schools or departments, or with leaders of key student organizations.

Team meetings in executive session: The schedule should include some short periods for the team to meet alone periodically throughout the visit. The team needs to meet to share observations of the meetings they have had and to see what findings and recommendations are emerging as they learn more about the institution from evidence and interviews. On the evening of the second full day and on the morning of the third day, the team members will be intensifying their writing on assigned sections of the team report.

Pre-exit meeting conference with the CEO: On the last day of the visit, immediately before the public exit meeting, the team chair meets briefly with the CEO to explain the process for the exit meeting and to inform the CEO about major recommendations that the team will make in its exit meeting and report. The Chair may also use this time to share sensitive issues, such as personnel matters, that would not be included in the team's report.

Exit meeting: Immediately prior to the team leaving the campus, an exit meeting is held for the team to provide a summary of its commendations and recommendations to the campus community. This meeting is usually open to the campus community and attended by the CEO, key administrators, faculty, staff, and student leaders. The team chair facilitates the meeting and delivers the summary. The team leaves the campus immediately after the conclusion of this brief meeting. The team's commendations and recommendations are not discussed with the institution at the time of the meeting; however, note that the institution has an opportunity later in the process to respond to the report in writing and in person (See below under After the Visit). The WSCUC staff liaison typically does not attend the exit meeting.

Tips for Creating a Good Visit Schedule

- Avoid having too many meetings with large groups (e.g., more than eight), with the exception of large constituent groups (e.g., faculty)
- Schedule lunch and dinner meetings in private rooms as executive sessions – share menus or options for lunch selections with the team members
- Make certain that the CEO and other key members of the administration and faculty are available during the entire visit
- Schedule time in the team room for the team members between meetings with the campus groups
- Schedule some breaks for the team
- Include the location of each meeting on the final schedule
- Provide the team with a list of institutional representatives (names and positions) expected at each group meeting (except the open meetings)
- Allow time as needed between meetings for the members to walk to the next meeting location; assign persons to escort team members to their next appointments.
- If the campus is large or the weather is inclement, consider using golf carts to take team members to meetings.

Call with Team Chair and CEO

About four to five weeks before the visit, usually just after the team conference call, the team chair initiates a conference call with the CEO. At the option of the chair, the ALO, assistant chair, and WSCUC staff liaison may also participate. The purposes of this call are to set the visit context, to highlight any

major issues or challenges that the team an institution will address, and to begin to establish rapport between the team and the institutional leadership.

Confidential Email Account

WSCUC staff creates a confidential email account for each visit. A sample notification about this account with the email address is included in the preparation information provided to the ALO by the WSCUC Visit Process Manager. The email account gives those who cannot or do not wish to attend one of the open meetings an opportunity to communicate with the team. This is a particularly important strategy for institutions with distributed online students who cannot come to the campus.

The ALO is responsible for distributing this notice to the entire campus community and for copying the WSCUC staff liaison on this message. The assistant chair monitors the account for messages. The account is closed as soon as the visit is over.

The assistant chair and staff liaison read all emails carefully but do not respond to them and will not include any comments in the team report unless the team has an opportunity to investigate the comments and the institution has an opportunity during the visit to respond. The assistant chair will summarize the nature of the messages for the team and read any salient messages.

Technology Resources

Most team members will bring their own laptops. The ALO may be asked to provide flash drives for team members to store and transmit their notes and sections of the team report.

Power strips should be provided in the team room at the hotel and on campus so that team members may plug in their laptops while working at the conference table.

A printer and copier should be available in the team room on campus, connected to any computers provided by the institution and easily connected to the team members' laptops. Some teams may also request access to a printer/copier in the team room at the hotel. Some teams may request a screen to project their laptops for group writing. This is particularly useful in the team room at the hotel where much of the writing takes place.

The team should have access to the internet on campus and at the hotel.

The ALO should alert the institution's IT staff to be on call for assistance and trouble shooting and should give the team contact information for the IT staff in case any team members experience computer or printer problems during the visit. IT staff should be available in the team room on campus when the team first arrives to ensure that members can fully access the resources available to them.

Team Meals and Special Dietary Needs

The schedule for the visit will show mealtimes for the team. Team meals will include the team only, in executive session, though in some circumstances, meals may be held during meetings with institutional representatives.

It is preferable for the team not to have to go off campus during the middle of the day for a meal because of the travel time required. If a meal must be held off campus, the location should be as close as possible to the campus to minimize travel time. Lunch is most often in executive session in the team room on

campus. The ALO should provide menu options to the team so they may select lunch according to their preferences and dietary needs.

Teams usually have breakfast and dinner on their own during the visit. The ALO should discuss restaurant preferences with the team chair or assistant chair and make recommendations and reservations as needed. The ALO should select restaurants that are quiet, or, have a private or semi-private space for the team, so that the team can talk in a confidential setting.

As noted in the logistics questionnaire, the ALO should determine if any team members have food allergies or special dietary needs and make special arrangements for suitable food on campus and recommend restaurants that will be able to cater to these needs.

Team members are often on campus for extended periods, do not always get to eat their entire meals during rushed or working meetings, and are going to back-to-back meetings. Therefore, teams appreciate having mid-morning and mid-afternoon light snacks in the team room and having a supply of water, soft drinks, fruit, coffee, and tea.

Token Gifts of Appreciation

Institutions are discouraged from providing gifts and team members, Commissioners, and staff are expected to refuse gifts in order to avoid any inferred conflict of interest. This rule does not extend to food for consumption by the team on the visit or supplies that expedite the team's work. Modest token gifts (coffee cups or travel mugs, fruit or snacks, bottled water) can be provided to team members and the staff liaison.

Hotel

The institution is responsible for making arrangements for single-room accommodations in business-class hotels for each team member for the entire visit, and for the WSCUC staff liaison. The liaison may leave earlier than the team members. The institution should arrange for direct billing or pay for the hotel rooms in advance so that team members do not have to carry this cost. Hotels should be as close to the campus as possible, have internet access, have meeting rooms, and have a restaurant where breakfast and dinner are served.

The ALO should arrange for a meeting room at the hotel that the team can use for its executive session on the afternoon before the visit starts, at the end of each of the two days on campus through the late evening hours 10 or 11 pm, and on the morning of the last day of the visit. The ALO should ascertain the times that a hotel meeting room is needed once the schedule is finalized and make these arrangements, letting the team and WSCUC staff liaison know the location of the room. The meeting room at the hotel should include a large conference table to seat 6 or 7 persons comfortably with laptops and ample space to work, a power strip for plugging in laptops, and a screen to display laptops if requested by the team.

Transportation

The team and the ALO should work closely together on travel arrangements for the visit. If a team member is within driving distance, the ALO should provide instructions for reaching the campus by car, taxi, train, and other forms of transportation. If the team member is traveling by air, the team member will make reservations and give the ALO flight information on the logistics survey.

The ALO is responsible for arranging local transportation to and from the airport and to and from the campus. Due to different flight schedules, team members may prefer to take a taxi or ride share – and if doing so, should indicate on the logistics form. Sometimes one or more team members travel by car to the institution or rent a car and can transport the team to and from the campus (though, if team members are unfamiliar with the area it is typically better for the team if the institution provides the transportation). Some institutions utilize a van to transport the team to and from campus each day of the visit.

As noted above, the ALO should notify the team of hotel and transportation arrangements in the logistics survey and remind the team a few days before the visit.

Team Room

The institution should arrange for an on-campus meeting room for the visiting team for the entire visit. The meeting room at the hotel should include a large conference table to seat 6 or 7 persons comfortably with laptops and ample space to work, a power strip for plugging in laptops, and a screen to display laptops if requested by the team. The room should be set up for the exclusive use of the team members during the visit to review documents, confer among themselves, and continue drafting assigned sections of the team report. Team members should have access to the team room during the day and evening hours. No one else should have access to the room without the team chair's permission, and the team members should be able to lock up their personal items, computers and notes in the room. It is helpful if each team member has a key to the team room. Meetings with institutional representatives should not be held in the team room.

The ALO should set up the team room with the following resources:

- Computers for individual team members, if requested
- A copier and a printer that the team can access electronically through their own computers, if requested
- A screen for displaying a laptop for group drafting activities
- Technology supplies, such as flash drives
- Office supplies, including pads, scratch paper, pencils and pens, a stapler, paper clips, post-it notes
- Box of tissues
- Beverages, including coffee, tea, soft drinks and water, and snacks

Documents in the Team Room:

WSCUC encourages all documents to be submitted electronically through the WSCUC cloud server. Printed copies are only necessary when a team member makes such a request. Additional documents often include materials requested by the team as a result of the team's discussion on its pre-visit team conference call or as specified in the Lines of Inquiry following the Offsite Review. Documents should be provided in electronic format ahead of the visit.

Additional documents may include: course syllabi; student transcripts; samples of student work, such as portfolios; samples of examinations and assignments; handbooks and catalogs; detailed financial, facilities, and planning material; historical documents; program reviews and supporting documentation; and data analyses that back up strategic and financial plans. A list of the exhibits is also helpful, with hyperlinks in the case of electronic exhibits.

Visit Information to the Campus Community

The ALO should remind the campus community (administration, governing board members, faculty, students, and staff) about the nature and purposes of the visit at least a month before the visit.

Most ALOs communicate about the visit in a variety of ways, including a posting to the website, emails to various groups, texts, messages using social media apps, signs and posters on campus, and announcements in classes and meetings. Notices should include information about the open meetings for faculty, staff, and students and the address of the confidential email account that will be open during the visit.

Once the team approves the schedule for the visit, the ALO should invite the key individuals and groups to the specific meetings and interviews and follow up a few days before the visit with reminders.

Off-Campus Locations and Distance Education Programs

Team Review of Off-Campus Locations

The team is provided with information about the number and physical addresses of off-campus locations and the programs that are offered at each. Under U.S. Department of Education rules, WSCUC must visit off-campus locations periodically.

If an institution has off-campus locations, the team chair works with the WSCUC staff liaison to determine the number of those locations that should be visited. In general, for locations that offer 50 percent or more of a degree program, 25 percent of those locations will be visited. If an institution has a history of concerns about the quality and functioning of off-campus programs or locations, at least 50 percent of the locations for those institutions with 10 or more locations and 75 percent for institutions with fewer than 10 off-campus locations must be visited.

The team determines which locations should be sampled by considering the type of location, the type of programs offered and number of students in attendance.

In cases where several off-campus locations must be visited, the visits may be scheduled on dates in advance of the main campus visit.

Team members who are assigned to visit off-campus locations review previous substantive change letters and visit reports to determine if issues have been identified for the team to review. The institution will prepare a briefing ahead of the visit to the off-campus location and the completed off-campus location form becomes an appendix in the team's report. The Off-Campus Location form is available on the WSCUC website.

On the pre-visit conference call, the team develops a strategy for reviewing off-campus programs, sets a schedule for interviews with staff, faculty and students, and identifies files and other documents to be reviewed, such as program reviews and samples of student work. The team members that visit an off-campus location complete a short report form, detailing the visit. This form is attached to the team's report as an appendix. The team will determine whether matters reviewed on visits to the off-campus locations will also be integrated into the team report.

Team Review of Institutions Offering Distance Education

WSCUC teams are also required to evaluate the institution's use of distance education for the delivery of programs during the accreditation process. The team is provided with a list of the programs delivered by a majority distance education. For institutions using distance education delivery that have no majority distance education programs, a sample of courses using the modality should be reviewed. The team chair assigns one or more members to review distance education. If the institution has a substantial number of distance education offerings, the team will include at least one member with extensive expertise in distance education.

Teams are provided with the Distance Education Team Report Appendix Form and the Distance Education Review Guide which details how to conduct a distance education review. Teams use this document as a guide in assessing the quality of online programs. This document was adopted by the seven regional accrediting commissions in the U.S. to provide guidance in reviewing distance education programs. Teams should also refer to WSCUC's online training module for evaluating distance education.

The team reviews previous substantive change letters and reports of previous reviews of distance education programs to determine if concerns have been raised. The institution will prepare a briefing ahead of the review distance education review and the completed distance education form becomes an appendix in the team's report. The Distance Education Form is available on the WSCUC website.

In planning the visit, the team develops a strategy for reviewing distance education programs during the visit, including a schedule for interviews with staff, faculty, and students and review of files and other documents, such as course syllabi, program reviews and student work. Further, the team member(s) assigned to distance education programs will observe archived online classes, so the ALO should provide a list of courses that can be observed in advance of the visit and make the necessary arrangements to allow for such observation. The team members who review distance education programs prepare a standard form, which is appended to the team report. The team decides if any matters raised in the reviews of distance education are integrated into the body of the team report.

Onsite Review of Institutions which are Completely Online

Institutions that offer 100% online programs may hold onsite accreditation visits at their administrative headquarters if space allows or may rent suitable conference space at a hotel or an office building. Private business grade conference room(s) are required for the team room and all meetings where 6 or 7 persons can sit comfortably with space for laptops and other materials on the table. Meetings may not take place in hotel executive suites.

In the cases where visits will take place in the same hotel where the team is staying –

- 1) all campus officials must stay at a different hotel to give the team privacy to interact,
- 2) only one team conference room is required at the hotel since the hotel and meeting location are at the same place; however, all the requirements for the team room posted in this Guide remain regarding the quality, amenities, and access to the team room (please refer to sections in the Guide that outline these requirements)
- 3) meetings between the team and campus officials may not take place in the team room – separate private business grade conference room(s) are required for these meetings

Accreditation visits will take place in the town where the official address of the campus is located. Video teleconferencing may be used for open meetings with faculty, staff, and students. Prior to the visit, the ALO and the Assistant Chair should determine which representatives of the institution should appear in person and which representatives may appear via video teleconferencing.

Other than the special logistics listed here, all other logistical procedures remain the same for 100% online institutions.

Part II. During the Visit

Resources and Support for the Team

Team members are extremely busy during the time they are on the campus. To help make the visit run smoothly, the ALO should create an information packet for them to use while on campus and provide this material on the team's first visit to the team room.

The packet could include information such as:

- A copy of the schedule for the visit, including any last-minute changes
- Names of key staff members available in case of questions or problems with meeting rooms, computer equipment, copiers, printers, etc. including room numbers and cell phone numbers
- Information on access to campus buildings and parking
- Cell phones for key personnel, including those responsible for handling schedule changes and other matters (usually the ALO)
- Menus from which to order meals that the team will have brought to them in the team room
- Transportation arrangements between the hotel and campus each day, and to the airport on the final day of the visit, if applicable
- A reminder that the institution will pay the hotel costs at the end of the visit

Understanding Team Strategies

Teams use a variety of evidence-gathering techniques during visits. To prepare the campus for the kinds of activities in which the team will be engaged, the following is a list of some of the techniques that might be employed:

Audits: The team may examine what led an institution to a new policy or decision or may follow the application of a process. For example, a team member may follow the handling of a student grievance to see if the institution's policies and procedures were followed. The team may also examine the methods employed by the institution to study an area of interest and review the documents and data that were examined, e.g., the samples examined, the results generated, and what was done with the results.

Focused interviews: All teams use various interviewing techniques, often employing a set of previously agreed-upon questions or lines of inquiry to confirm information in the report, to ascertain involvement of constituencies, to gauge the support for undertakings, and to gather evidence pertinent to the review. Some teams use innovative techniques, such as fishbowl exercises, which are generally planned with a specific group in advance of the visit.

Document reviews: All teams examine original documentation to understand processes, planning, and decision making, and to validate the findings, analyses, and conclusions contained in the institution's reports.

Reviews of evidence of student learning: Teams will examine course syllabi to see if student learning outcomes are set forth, look at processes and methods used to assess student learning at the course, program and institutional level, and ascertain the capacity of the faculty to undertake assessment of student learning. Assessment results are examined to find out what students learned, how closely this meets the institution's intended outcomes, and what was done with the results of assessment to improve student learning and to refine assessment tools and processes. Teams also look at program reviews, actual

student work, standards used to evaluate work, rubrics and other evaluation tools, and written comments about the work, including feedback given to the students.

Tips for a Smooth Visit

- Be sure all transportation arrangements are in order so that the team arrives on time in the right place and starts out the visit without stress
- Double-check hotel reservations and payment arrangements so that team members do not have to use credit cards
- Expect a few adjustments to the schedule and requests for additional documents and be ready with staff to implement these requests
- Help keep the team on schedule by reminding them at the end of meetings
- Provide team members escorts to meetings so they do not have to navigate the campus alone and risk being lost or arriving late
- Provide transportation to meeting for team members if the campus is particularly large, in case of inclement weather, or if team members have limitations that are contraindicated for lengthy walks

Part III. After the Visit

Communications After the Visit

With the exception of the communication between the team chair and the institution to discuss possible corrections of errors of fact in the report, the institution should not contact team members after the visit to discuss the visit, report, process, or next steps. Team members are bound by a duty of confidentiality not to discuss the visit with anyone except their colleagues on the team and WSCUC. Once the visit is over and the report is finalized, the team is disbanded and has no further duties, except the duties of the chair, noted below. Further, under Commission policy, team members are not permitted to consult with an institution that they have visited for one year following the visit.

Team Report

Teams are required to follow a specific format in drafting reports. The directions and templates for the reports contain detailed explanations of the format for each type of visit and can be found on the WSCUC website.

Team reports have an introductory section with an overview and context for the visit, and a description of the quality and rigor of the institution's presentation, the visit process and the evidence reviewed by the team. Team reports will also use this introductory section to address actions taken by the institution in response to the last team report and Commission action letter (or Eligibility Review Committee letter, where the visit is a first Seeking Accreditation Visit).

The focus of the body of the report depends on the type of visit. For Seeking Accreditation Visits, the focus is on compliance with the Standards and the institution's preparedness with regards to areas of focus in the Handbook for Accreditation. For Accreditation Visits, the focus is on evaluation of the essays and exhibits submitted by the institution. For TPR reviews, the focus is on the institution-developed themes. For Special Visits, the second part of the team report comprises an analysis of progress on the issues raised in the last Commission Action letter.

The final section of the team report summarizes the key findings, commendations, and recommendations of the team. Teams are expected to develop commendations and recommendations during the visit that will be shared verbally with the institution during the exit meeting. Before the visit, team members should begin drafting preliminary sections of the report that will be revised and added to during and after the visit. During the visit, team members should continue drafting and refining the report, but there is no expectation that the draft will be finished during the visit itself. The Assistant Chair will review the post visit report writing schedule before the end of the visit so all members are aware of deadlines.

Draft Team Report

Usually within five weeks of the visit, the team chair sends the draft team report as a pdf to the CEO and ALO with a copy to the WSCUC staff liaison. The chair asks the CEO and ALO to review the report with other institutional representatives and to respond by email within ten business days with any suggestions for corrections of factual errors or redactions of proprietary information.

This initial response to the report is not the formal institutional response to the findings and recommendations of the team. Rather, this stage is intended to eliminate errors of fact before the report

is finalized. The institution should not suggest changes that constitute the addition of information not available to the team and should not dispute the team's analyses or conclusions at this stage. The chair considers the institution's requests for corrections and makes those corrections that are purely factual in nature, and any necessary redactions of proprietary information. The chair may consult with team members and staff, as necessary, to correct or clarify factual matters or proposed redactions of proprietary information.

Final Team Report and Institutional Response

After making any factual corrections and redactions, the chair submits the final version of the team report, as well as the Confidential Team Recommendation, to the WSCUC office.

The WSCUC Visit Process Manager sends the final team report to the CEO of the institution, usually about eight weeks after the visit. The CEO is invited to submit a letter commenting on or responding to the report and the team's findings to the WSCUC office. If the institution has serious concerns about the report, the ALO should notify the WSCUC staff liaison immediately. Written submissions from the institution about the report should be conveyed to the WSCUC staff within 14 days of receipt of the report by the institution and no later than four weeks prior to the Commission meeting.

The written institutional response becomes part of the record of the institution and is considered by the Commission in its deliberations. Please note that the written response must be received in a timely manner. Late submissions will not be included in the Commission's deliberations.

Commission Meeting and Action Letter

Visits that take place in the fall are reviewed by the Commission when it meets in February of the following year. Spring visits are reviewed in June of the same year.

At the meeting, the Commission convenes in panels of five or more members. Each panel reviews and makes recommendations to the Commission about several institutions. Panel members receive the institution's accreditation history, the team report, the institution's response (if provided), the team's confidential recommendation, the institution's report and, for Accreditation Visits, the additional documents provided by the institution after the Offsite Review. Additional documents may be provided depending on the type of review. For example, for Seeking Accreditation Visits, the panel is given a copy of the Committee letter granting eligibility, and for Special Visits, the panel receives a copy of the Commission action letter that requested the Special Visit.

A portion of the panel review time is dedicated to discussion with the institution's CEO and other institutional representatives as nominated by the CEO. The CEO is normally expected to participate in person, although for some Special Visits the CEO may be invited to participate by conference call. The team chair is also invited to participate in the discussion by conference call.

The Commission Meeting Guide (available on the WSCUC website) sets forth the protocol for the institutional appearance before the Commission.

Schedule for The Commission Meeting

Commission meetings are normally planned over two days, depending on the number of institutions being reviewed. Institutional reviews take place on the Wednesday or Thursday of the meeting. The Commission convenes on the Friday to make its final decisions.

WSCUC staff will inform the institutional about the time, date, and location of the meeting and whether the CEO is required to attend in person.

Due to the complexity of scheduling these meetings, it may not be possible to let institutions know the precise time or date of their review until three or four weeks before it takes place. CEOs may therefore be asked to hold both the Wednesday and Thursday dates open on their calendars until the schedule is finalized.

Protocol During the Commission Meeting

The panel has a brief discussion about the institution and the team report prior to the institutional representatives joining the conversation. The team chair is also on the line to talk with the panel at this time.

A WSCUC staff member then escorts the institutional representatives into the room or, if they are participating by phone, will call to join them to the conference line. The CEO is invited by the panel leader to make a statement about the institution, to provide updated information about matters that have taken place since the time of the site visit, and to respond to questions from Commissioners.

The institution representatives then leave the room or leave the conference call line. The panel may ask the team chair for additional comments before the chair exits the call. The panel then deliberates and prepares a recommendation to be forwarded to the Commission for action.

Commission Action Letter

WSCUC sends the Commission action letter to the CEO with a copy to the ALO as soon as possible after the Commission meeting, usually within three weeks. A copy of the letter is subsequently sent to the chair of the governing board, to the head of the system (if the institution is part of a system), and to members of the visiting team.

The Commission encourages widespread distribution of the action letter and team report within the campus community. According to Commission policy, the institution should avoid quoting only those portions of the report that are favorable to it.

The institution will address the requirements listed in the action letter at the next contact with WSCUC and the team that next visits the institution will review the matters highlighted in the letter. As noted above, a section of the next team's report will address actions taken and progress made in addressing the issues raised in the letter.

Publication of Commission Actions

For any candidate or accredited institution, the Commission action letter and the underlying team report are made public on the WSCUC website shortly after the institution receives the letter.

Institutions should also refer to the Policy on Disclosure of Accrediting Documents and Commission Actions on the WSCUC website.

Follow-Up Meetings with WSCUC

If the Commission imposes a sanction and at the discretion of the WSCUC liaison, the CEO and representatives of the governing board and administration may be asked to meet with WSCUC staff to discuss the reasons for the Commission action, the institution's plan to notify the institution's community about the matter, and the institution's plan for addressing the issues that led to the sanction.

The Commission may also request that a meeting be held with the governing board. The purpose of this meeting is to ensure that board members understand the meaning of the Commission action and recommendation and their role in addressing areas of concern. If this meeting is required, WSCUC staff will contact the ALO to make the necessary arrangements.

Expenses, Fees and Billing Procedures

Accredited institutions are billed for all reimbursable expenses of the review team and WSCUC staff. In addition, a set fee is charged for each review and visit. ALOs may contact the assigned WSCUC liaison to ascertain how many team members will be appointed to a team in order to estimate the total review cost.

For Offsite reviews which are held via videoconferencing, team members will receive \$200.00 for incidentals – a reimbursement form is required, and receipts need not be submitted. For Special Visits that are remote, team members will receive \$100 per day for incidentals a reimbursement form is required, and receipts need not be submitted. For site visits, the institution pays the hotel costs for team members directly. Team members generally pay their own travel and meal costs and are then asked to submit claims for reimbursement of these costs to WSCUC within thirty days of the visit. The WSCUC Director of Finance and Operations reimburses the team members directly and then, once all expenses have been reimbursed, sends the institution a bill for the total costs and the relevant visit fee, usually within 15 days of the end of the visit. Institutions are prohibited from reimbursing expenses directly to team members.

All claims are carefully vetted by WSCUC, and only claims made in accordance with the Travel and Business Expense Policy are reimbursed. Reimbursement claims and receipts are kept for seven years for audit purposes. WSCUC does not provide institutions with copies of reimbursement claims or receipts.

The WSCUC Dues and Fees Schedule and the Travel and Business Expense Policy are posted on the WSCUC website.

Documents referred to in this guide may be located on the WSCUC website at <https://www.wscuc.org/resources>.