THE VISITOR MANUAL

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Council for Accreditation of Counseling and Related Educational Programs
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PURPOSE AND USE

This manual serves as a comprehensive guide for all team members—whether you are a Team Chair or a Team Member—in planning, conducting, and completing an on-site evaluation. Understanding the roles and responsibilities of both the Team Chair and the Team Members is crucial for ensuring a smooth and effective evaluation process. For this reason, the manual includes information on the duties of both roles, as well as how they work together to achieve the primary purpose of the site visit: to confirm the accuracy of the information provided by the institution in its Self-Study Report (SSR) and assess whether there is sufficient documentation to evidence compliance with accreditation standards.

By reviewing this combined resource, you will have a clear understanding of what is expected from each team member, including how your role contributes to the overall evaluation. We encourage you to also explore the Team Chair section of this manual for further details specific to the Team Chair's responsibilities during the site visit.

INTRODUCTION

When preparing for the on-site program evaluation, it is important to keep in mind both the CACREP Mission and the purposes of the evaluation. CACREP is an accrediting body recognized by the Council for Higher Education Accreditation (CHEA) to conduct on-site visits and determine accreditation status. Below are the CACREP Mission and Core Values.

CACREP Mission

The mission of CACREP is to promote the professional competence of counseling and related practitioners through the development of preparation standards; the encouragement of excellence in program development; and the accreditation of professional preparation programs.

CACREP Core Values

The CACREP Board of Directors believes in

- advancing the counseling profession through quality and excellence in counselor education;
- ensuring a fair, consistent, and ethical decision-making process;
- serving as a responsible leader in protecting the public;
- promoting practices that reflect openness to growth, change and collaboration; and,
- creating and strengthening standards that reflect the needs of society, respect the diversity of instructional approaches and strategies, and encourage program improvement and best practices.

The visiting team plays a crucial role in CACREP's accreditation process. The team visit is essential for evaluating the validity of the program's self-study narrative. A primary responsibility of the on-site team is to validate the self-study, and any other data submitted to CACREP, using methods such as interviews, site visits, classroom observations, and document reviews.

In addition to verifying how the self-study is implemented, team members must provide the CACREP Board of Directors with a thoughtful assessment of aspects of the program that cannot be fully evaluated from written documentation alone. Teams should recognize that programs may meet the same standards in different ways. Accreditation reviews are not only about policy enforcement but also involve professional peer judgments regarding program effectiveness.

ROLES AND RESPONSIBILITIES

The Verification Process

The site visit is designed to verify the accuracy of the program's Self-Study Report, which addresses how the program meets CACREP Standards. The goal is to assess whether the standards are being met through evidence provided during the visit. The site visit is not an investigation but a process to confirm that the program meets the specific criteria set forth by CACREP.

Professionalism among Team Members

While on a site visit, whether in-person or virtual, team members serve as ambassadors not only for CACREP but also for the counseling profession. Professionalism during visits is essential, and all team members are expected to uphold the following standards:

- Dressing professionally, regardless of the standard acceptable dress at your home institution or the mode of the visit (in-person or virtual).
- Functioning as part of a team, collaborating effectively with all members.
- Maintaining confidentiality about issues and questions discussed, keeping them within the team.
- Working toward consensus among team members on key issues and findings.
- Acting ethically, judging the program based on its own merits, and not in comparison to other programs.
- Treating all individuals with whom the team interacts, whether on campus or virtually, with respect and dignity.
- Ensuring communication with the program's representatives is primarily channeled through the Team Chair, to maintain clarity and organization.

Additionally, when agreeing to serve on a site visit, team members are expected to fully commit to the visit. It is essential that all members do their best to perform this duty unless an emergency arises. Last-minute withdrawals, except in cases of true emergencies, can disrupt the team's ability to effectively carry out the evaluation process and should be avoided.

Conflict of Interest Issues

All members of a site visit team should abide by CACREP's "conflict of interest" policy. This includes considering whether any aspects of the policy are applicable before agreeing to serve of a team for a particular institution.

"A conflict of interest is defined as a circumstance in which an individual's capacity to make an impartial or unbiased accreditation decision may be affected because of prior, current, or anticipated instructional affiliation(s), other significant relationship(s) or association(s) with the faculty members or institution under review".

Some examples of situations that might trigger an unacceptable conflict of interest include:

- if you are a graduate of the institution under review;
- if you or a spouse/partner ever worked at that institution;
- if you or a spouse/partner ever applied for a position at that institution and did not receive an offer;
- if a former student with whom you have kept in contact is on the faculty;
- if you have a bias concerning the type of program delivery system the institution uses (e.g., the program is offered on-line); and/or
- if you are friends with any of the faculty or have had a professional or personal disagreement with one of the faculty.

If you have any questions or concerns about these or other issues that could affect your ability to be impartial, you should consult with a CACREP staff member before agreeing to serve on the review team. The perception of fairness in the review process is critical. It is essential that all team members avoid any real or perceived bias to maintain the integrity of the review process.

How to be an Effective On-Site Team Member

Prior to the site visit, the institution's faculty have dedicated significant time and effort to prepare the Self-Study Report, which you must carefully review, standard-by-standard, before your arrival. Both the institution's faculty and administrators, as well as your fellow team members, will expect you to arrive fully prepared—having thoroughly reviewed the Self-Study, familiarized yourself with the program, and identified any initial questions.

In addition to reading the Self-Study Report, you should familiarize yourself with all relevant correspondence, such as the initial review letter and any addenda sent with the Self-Study, from the time CACREP receives the application.

Your Team Chair will communicate with you prior to the visit to share the schedule they've arranged with the Program Liaison. Prompt responses to the Team Chair's communications—whether calls or emails—are appreciated, as they are responsible for coordinating many aspects of the visit. All communication regarding the visit should be directed to the Team Chair. For assistance with travel or logistical concerns, contact the CACREP office.

You should plan to meet with your fellow team members on the first evening of the visit to finalize plans, share impressions, and identify any questions. It is expected that you will come to this meeting fully prepared and familiar with the relevant review documents.

Always keep in mind that accreditation involves professional judgment in the absence of absolute standards—it is not a perfect process. Be aware of CACREP's limitations and strive to work within its intended purpose and scope.

An effective team member is:

- Prepared and knowledgeable
- Reasonable
- Judicious

- Objective and consistent
- Flexible
- Fair
- Responsive
- Cooperative
- Trustworthy

Consistency in judgment, action, and evaluation is essential. However, it is also important to recognize and accommodate necessary changes. Institutions seeking CACREP accreditation have made substantial investments of time and money, so be helpful, prompt, informative, and respectful. All knowledge gained during the evaluation process must remain confidential, both before and after the accreditation decision is made.

The above precepts have been paraphrased and adapted from the *Accreditation Manual* published by the Commission on Accreditation of Allied Health Education Programs (CAAHEP).

VISIT ROLES AND RESPONSIBILITIES

Reaching the site visit stage is only half of the accreditation review process for an institution. At this point, the institution must effectively demonstrate its strengths to a site visit team, which will thoroughly assess its program(s). For the site visit to proceed successfully with minimal confusion or challenges, all primary parties involved must take on specific roles and responsibilities. These roles and responsibilities can be divided into three key stages: before, during, and after the visit.

THE CACREP Staff

Prior to the visit, the CACREP Staff will:

- Obtain team members and schedule the dates for the visit. A typical site visit consists of a three-day review of the program(s), beginning on a Sunday night and continuing through approximately noon the following Wednesday for in-person site visits. For virtual visits, a typical visit consists of a three-day review of the program(s) beginning Sunday through Wednesday or Wednesday through Friday.
- Inform the institution that the visit has been set and forward procedural details regarding the site visit to the CACREP Liaison; and
- Provide the team members with necessary instructions and materials, in addition to pertinent correspondence between the CACREP Office and the institution.

During the visit, the CACREP Staff members are available during normal office hours (Eastern time) for any questions that the team may have that need to be addressed in order to complete the visit. Such questions should be channeled through the Team Chair.

After the visit, the CACREP Staff will:

- Receive the report submitted by the site team, process it, and forward copies, to the institution's President/CEO, Dean,
  Department Chair and CACREP Liaison. The cover letter sent by the CACREP President/CEO informs the institution that they have 30 days in which to respond to the report in writing; and,
- Process the team members' travel and expense forms and mail reimbursement checks.

THE CACREP Liaison

Prior to the visit, the CACREP Liaison will:

- Correspond with the Team Chair to coordinate the on-site visit agenda and interview schedule;
- Inform individuals on- and off-campus who will be participating in the visit and interviews of the purpose of the visit and interview;
- Arrange for the availability of a suitable personal computer (ideally a laptop) with internet access and a printer for the team's use during an in-person visit. The Liaison should check with the Team Chair on whether or not a computer is needed and if the team has a preference for a PC or MAC;
- For in-person visits:
    a. Arrange transportation for team to and from the airport and to off-campus sites during the visit (unless team has been approved for a rental car);
    b. Arrange hotel accommodations near campus
        i. The hotel should be reasonably close to the institution. Sometimes institutions can get better room rates when they pay the bill directly and allow CACREP to reimburse the institution later. The CACREP Liaison should inform the Team Chair about the payment arrangements in advance. Generally, the individual team members pay for the rooms and then are reimbursed by CACREP.
    c. Provide information to the team regarding transportation, lodging information, taxi services, parking, local restaurants, etc.
- For virtual visits:
    a. Create a folder with the requested documentation for review
    b. Conduct a technology check with site team
    c. Verify that all site team members have access to additional materials beyond the reports submitted directly to CACREP

During the visit, the CACREP Liaison will:

- Maintain regular communication with the Team Chair, checking in periodically to ensure that the visit is running smoothly;
- Ensure the team has an adequate workspace with assured privacy;
- Provide additional information and documentation as requested by the team; and,
- Make sure that housing arrangements are satisfactory, and that transportation is arranged.

After the visit, the CACREP Liaison will:

- Send a written response to the on-site team report within the designated 30-day time period; and,
- Return the completed team member feedback to the CACREP Office within 30 days of the visit's completion.

The Team Chair

Prior to the visit, the Team Chair will:

- Communicate with the institution's CACREP Liaison in order to arrange the tentative site visit agenda;
- Discuss with the CACREP Liaison who should be included in the interviews (i.e., current students, graduates of the program, departmental faculty, faculty outside the department, administrators (e.g., Dean, CEO), and site supervisors (internships/ practica); and,
- Communicate with the team members to discuss travel arrangements (if on a scheduled in-person visit) and assign duties to each visiting team member either prior to the visit or during the pre-meeting on the evening before the interviews begin. The Team Chair will also discuss preferred arrival and departure times. Generally, arrival is the afternoon before the visit begins; departure is after the exit interview, usually not before noon on the last day of the visit.

During the visit, the Team Chair will:

- Lead the team in the validation of the Self-Study and other data presented to the CACREP Board. This is accomplished by gaining an understanding of those aspects of the program that could not be fully evaluated from the documentation supplied by the institution and those standards that were highlighted by the initial reviewers to be attended to during the visit;
- Serve as the primary spokesperson for the team;
- Contact the CACREP Office during the visit, if necessary, to seek clarification on the standards or any issue related to the on-site visit;
- Meet periodically with the team to exchange data and opinions and to plan for the further conduct of the visit;
- Divide the tasks of writing the final report among the team members. The final meeting of the team is a time to formulate impressions, recommendations and requirements to prepare the final team report; and,
- Conduct the exit presentation, with the team members and appropriate university officials and faculty present, prior to departing the site.

After the visit, the Team Chair will:

- Complete the on-site team report based on the determinations made by the team;
- Seek approval of the final report from the team members prior to submission;

- Submit the final report to the CACREP office within two (2) weeks of the completion of the visit;
- Complete the fellow team member evaluation forms and return them to the CACREP Office; and,
- Submit an expense reimbursement form to the CACREP Office.

Team Members

Prior to the visit, the individual Team Members will:

- Thoroughly review the accreditation materials provided by the institution and the CACREP Office.
- Take detailed notes to ensure you are well-prepared for the initial team meeting and any pre-visit discussions.
- Make transportation arrangements (if scheduled for an in-person visit), and coordinate with the Team Chair. Direct billing to CACREP for airline fares can be arranged by utilizing the CACREP travel agency.

During the visit, the individual Team Members will:

- Thoroughly review all pertinent materials (e.g., curriculum items, library facilities and resources, clinical facilities, staff/office facilities, student records, assessment plan related items, web site content).
- Conduct interviews with academic staff, administrative officers, individual faculty, clinical site supervisors, current students and alumni.
- Meet periodically to exchange data, impressions, and plan for the remainder of the visit. Team Members should keep their opinions and observations confidential, sharing them only within the team. Any communication regarding the visit's progress should be directed through the Team Chair to the institution's CACREP Liaison.
- Discuss the final report. Sufficient time must be allotted to formulate impressions, write specific recommendations, and identify any unmet standards. While the team may begin drafting the report prior to the exit presentation, the Team Chair is responsible for compiling the final version. The Team Chair is responsible for the final collation of the individual sections. However, all team members should review and approve the report before it is submitted to the CACREP Office.
- Participate in the Exit Presentation. The Team Chair, with the full team, conducts the Exit Presentation with key institutional representatives before ending the visit.

After the visit, the individual Team Members will:

- Submit a travel and expense reimbursement form. Reimbursements will be made promptly to the Team Members following authorization by the CACREP President/CEO.
- Complete and submit to the CACREP Office the fellow team member evaluation forms.

LOGISTICAL INFORMATION FOR IN PERSON VISITS

CACREP Contact Information

Telephone: 703.535.5990
Web site: www.cacrep.org

Address: CACREP
500 Montgomery Street, Suite 350
Alexandria, VA 22314

E-mail: cacrep@cacrep.org

Travel Agency Contact Information

FCM Travel Solutions: 1-866-749-7533
Emergency #: 1-866-821-9634

Airports/Transportation to the Visit

In most cases, team members will travel by plane to participate in in-person visits. However, depending on distance or regional travel considerations, personal cars, buses, or trains may be used. If a team member chooses alternative travel arrangements for personal reasons, it is recommended to contact the CACREP Office to clarify reimbursement policies.

Whenever possible, it's helpful for all team members to arrive at the same airport around the same time. Typically, the institution will arrange transportation to both the hotel and the institution for the team members. This travel information should be provided to team members in advance.

Team members should avoid renting cars for transportation during the site visit. If special circumstances require a rental car, the Team Chair must contact the CACREP Office in advance to obtain approval.

Once travel arrangements are made, any changes to flights will be at the team member's personal expense, unless valid extenuating circumstances exist. The team member must seek pre-approval from the CACREP Office before making changes for which reimbursement is requested.

Hotels and Meals

The Team Chair will coordinate with the Program Liaison to determine where the institution will reserve accommodations for team members. Each team member should have a private room. Ideally, the hotel will offer complimentary internet access, allowing team members to access the CACREP website and address personal or professional matters during downtime. This will be confirmed by the Team Chair in consultation with the Program Liaison during the visit planning process.

The CACREP Liaison may select a hotel with an agreement regarding billing or preferred rates. In such cases, the hotel will often direct-bill the institution, which will then forward the charges to CACREP for processing. If no such arrangement exists, team members will need to pay for lodging out-of-pocket and submit for reimbursement to CACREP following the visit. Please do not assume that the institution will cover hotel costs.

Team members receive a per-diem allowance for meals; no receipts are required for per-diem claims. Current per-diem rates are available on the CACREP website. Any incidental expenses (e.g., mini-bar, movies) are the responsibility of the individual team member.

If you have special dietary needs, please notify the Team Chair prior to the visit so accommodations can be made and the CACREP Liaison can inform the institution if joint meals with institutional representatives are planned.

Transportation of Team Members during the Visit

The institution's CACREP Liaison will arrange transportation for team members to and from the airport (or other stations), the hotel, selected practicum and internship sites, and multiple sites if necessary. In some cases, team members may need to arrange a shuttle with the hotel or take a shuttle to/from the airport, depending on distance and other factors. The CACREP Liaison should inform team members in advance about any such transportation arrangements.

LOGISTICAL INFORMATION FOR VIRTUAL VISITS

CACREP provides Zoom rooms for all virtual visits. The Site Visit Coordinator will schedule a tech check the week prior to the scheduled visit to ensure that the CACREP Site Team can access the rooms properly. The CACREP Liaison for the program hosting the visit should be present, if possible, for any last-minute questions.

TYPES OF REVIEWS

CACREP conducts several types of accreditation reviews that may involve an on-site or virtual visit. Most of these visits will fall under either full reviews or reviews related to programs being added during an accreditation cycle. In some cases, site visits may also be scheduled due to substantive changes made by an institution or concerns raised by the CACREP Board during the accreditation process. Team members will be notified of the type of review when they are contacted about serving on a visit. If there are any questions about the type of review, please contact the CACREP Office for clarification.

Full Reviews

Full reviews are conducted when institutions apply for initial accreditation of counseling programs or when programs are due for reaccreditation. For most new programs seeking initial accreditation, an in-person visit will be required, unless the program is offered entirely online. Site teams for full reviews consist, at minimum, of at least three team members including a team chair. A typical site visit consists of a three-day review of the program(s), beginning on a Sunday night and continuing through approximately noon the following Wednesday for in-person site visits. For virtual visits, a typical visit consists of a three-day review of the program(s) beginning Sunday through Wednesday or Wednesday through Friday.

Programs Being Added

Institutions with counseling programs already accredited by CACREP may choose to seek accreditation for additional counseling programs during an accreditation cycle. In some cases, on-site visits may be waived for these accreditation reviews, depending on several factors. If an on-site visit is required, it may either be abbreviated or full. A full visit follows the same format as the one described above. An abbreviated visit consists of at least two team members, one serving as Team Chair, and lasts approximately two days. These visits generally start on Sunday afternoon or evening with a team meeting and end by late Tuesday afternoon with the Exit Presentation.

Multiple Sites

Some institutions deliver counseling programs at multiple sites, either for some or all courses. When most or all a program is offered at an alternative site(s), the institution may have addressed CACREP's 2016 Multiple Sites Policy. Under the 2024 Standards, the program's multiple sites will be addressed in the individual standard responses.

The on-site or virtual review will include an evaluation of the program at these sites to ensure that they are considered part of the single program delivered across multiple locations. Whether all or just some of a program is offered at alternative sites, the review will involve an assessment of these locations during the visit.

BEFORE THE VISIT

In addition to making any necessary travel arrangements and the arrangements with their home institution for the time they will be away, there are several things a team member will need to do to effectively prepare for a site visit.

Communicating with the Team Chair

Once you are informed about the team composition and your fellow Team Members, reach out to the Team Chair to introduce yourself and confirm that they have your correct contact information. Before the visit, the Team Chair will work closely with the CACREP Liaison and may require input from you and your fellow team members on logistical and planning matters. Some Team Chairs may also schedule calls or web meetings ahead of the site visit. If you anticipate being unavailable at any time prior to the visit, it's helpful to inform your Team Chair in advance for planning purposes.

Initial Review Letters

The CACREP Office will provide Team Members with copies of the review letter(s) sent to the institution prior to the approval for the site visit. An institution may have received a single Initial Review Letter, or a combination of a Requesting Addendum Letter and a Subsequent Addendum Review Letter. The purpose of the initial review process is to ensure that the institution has provided additional clarification and documentation to assist Team Members in their review prior to the site visit.

While these letters highlight notes on select standards, Team Members should not limit their review to only the issues identified in the review letters. <u>The site visit team is responsible for thoroughly reviewing all standards, including those identified in the letters, to ensure they are appropriately addressed during the visit.</u> The purpose of the site visit is to verify the information in the self-study (and any applicable addenda) in relation to all CACREP standards. Ideally, any issues highlighted in the review letters will have been addressed through the provision of additional documentation prior to the visit, but it remains the team's responsibility to evaluate and report on all standards.

Reading a CACREP Self-Study

A self-study is a comprehensive presentation by an institution detailing how its counseling program(s) meet the CACREP Standards and Policies. The review of a CACREP self-study is a non-linear process. Although the self-study is typically organized to follow the CACREP Standards in order, the information and documentation related to a specific standard may prompt reviewers to revisit earlier sections for clarification or to identify inconsistencies across responses. Through multiple cycles of review and re-review, a comprehensive understanding emerges of the program in relation to the CACREP Standards, along with the program's unique characteristics, strengths, and areas for improvement.

The review of the self-study should not be left until the last moment before the visit. While a quick refresher review just prior to the visit is helpful, a comprehensive review is time- and focus-intensive. Adequate time should be allocated to thoroughly assess the self-study and any supporting documentation.

Addenda

Most institutions, regardless of whether required or not, will develop an Addendum to the Self Study to provide additional clarification and documentation pertaining to the issues noted in the review letter(s). Team Members should review both the original self-study and the addendum to get a comprehensive picture of the program under review.

DURING THE VISIT

Visit Schedule

The Team Chair will collaborate with the institution’s CACREP Liaison to tentatively prepare an agenda for the visit. A sample site visit agenda is provided below; however, the schedule may vary based on the Team Chair's preferences (e.g., whether a planning dinner with the CACREP Liaison is scheduled, access to records, and the amount of documentation available). Other factors that may influence the schedule include the number of sites involved, the institution’s administrative structure, curriculum delivery methods, the program areas under review, issues identified during the pre-visit review of materials, and the team’s composition.

Programs should plan to schedule the meetings listed below as part of the site visit. Site teams may also request additional or program-specific meetings to ensure they gain a comprehensive understanding of the program.

a) Faculty (core faculty as a group and individuals as needed)
b) Faculty/Program Leadership (e.g., field experience coordinator, program director)
c) Affiliate Faculty
d) Students, by program
e) Alumni, by program
f) Site Supervisors, by program
g) Administrators (selected by program)

Example Site Visit Schedule

Schedule may vary based on many factors (in-person/virtual, availability of parties, needs of the team/program, etc.) In-person visits might include time for travel, scheduled team dinners, and any other activities needed prior, during, and after the visit. Virtual visits might include scheduled tech check-ins, pre-visit meetings, and any other activities needed prior, during, and after the visit.

Day 1, October 1st

Time	Activity	Stakeholders	Notes
8:30 – 9:00am	Team Planning Meeting	Team Members Only	Internal alignment
9:00 – 9:45am	Meet with Department Chair	Department Chair Name	
10:00 – 10:45am	Faculty Interviews	Full-time & Adjunct Faculty	
11:00 – 11:45am	Meeting with Site Supervisors	Attendee Names	
12:00 – 1:15pm	Lunch/Team Debrief	Team Members	Optional for review time
1:15 – 1:45pm	Meeting with Clinical Coordinator	Clinical Coordinator	
1:45 – 2:15pm	Meeting with President and Dean	President, Dean	
2:15 – 4:00pm	Document Review / Team Working Session	Team Members	CVs, syllabi, assessment reports
4:00 – 4:30pm	Chair + Liaison Check-In	Chair, Institutional Liaison	End-of-day clarification

Day 2, October 2nd

Time	Activity	Stakeholders	Notes
9:00 – 9:30am	Meet with Librarian and tour	Director of Library	Optional tour
10:00 – 10:45am	Meet with Assessment Support/Institutional Effectiveness	Dean of AS/IE, Support	
10:15– 12:00pm	Team Meets to Review Files, Syllabi, etc.		
12:00– 12:30pm	Meet with Advisory Board	Names	
12:30pm – 2:00pm	Lunch/Team Debrief	Team Members	Optional for review time
1:15 – 1:45pm	Meet with Campus Support Team	IT, Clinic Manager, Dept Admin…	
1:45 – 2:15pm	Meet with Current Students	Names	
2:15 – 4:00pm	Document Review / Team Working Session	Team Members	CVs, syllabi, assessment reports
4:00 – 4:30pm	Chair + Liaison Check-In	Chair, Institutional Liaison	End-of-day clarification

Day 3, October 3rd

9:00 – 10:00am	Exit Report Session	CACREP Liaison, University Leaders, Faculty	End-of-day clarification

Program Areas

The entire team is responsible for looking at the entire self-study, to include the general standards and the individual specialized practice areas (e.g., Addiction Counseling, Clinical Mental Health Counseling, School Counseling). If the institution has applied for review of only one program area, the entire team can focus on this program area. In instances where there are multiple program areas under review, the Team Chair will generally request that each individual Team Members assume a primary focus responsibility for a specific program area based on expertise. This Team Member will conduct a detailed review of the responses provided by the institution for those specialized practice areas and have the primary responsibility during the visit for meeting with the students, faculty, and site supervisors representing that practice area.

Use of Supplemental Documentation Provided by Program

During the visit, the program may provide supplemental information or documentation to support the review process. Team members should carefully examine any additional materials provided and assess them in relation to the relevant CACREP standards. If any documentation is unclear or if there are challenges accessing certain materials, team members are encouraged to request clarification or assistance from the program or the CACREP Liaison to ensure a thorough and accurate review. It is important to ensure that all necessary documentation is reviewed before making any final judgments.

Capturing Citation-Ready Notes

While reviewing documents and conducting interviews, capture three things for any standard that looks like it may not be met — the same three the Team Report will ultimately ask for: the specific standard element in question, the specific document or source reviewed (title, page, or section), and what exactly was missing or misaligned. Jotting these down while the material is in front of you takes far less time than reconstructing them from memory during report drafting.

In the moment, capture…	Rather than…
The exact CV or syllabus title and page you reviewed	*"Reviewed faculty materials"*
The precise sub-requirement (e.g., "2 of 4 engagement areas")	*"Faculty engagement is a concern"*
What was specifically missing or inconsistent	*A general impression to sort out later*

Visit Challenges

Every site visit will be different. This point cannot be overemphasized, nor should it be overlooked. The differences come from many sources:

- The uniqueness of each institution along with the individuality of the program(s) under review;
- the changing composition of the visiting teams sent to the institutions;

- the clarity, comprehensiveness, and organization of the self-study materials (or the lack of these characteristics);
- the nature and tone of the interactions that occur between the Team Chair and the CACREP Liaison and/or other program leader(s) in preparation for conducting the site visit;
- the nature and tone of the interactions between the Team Members and all parties involved in the site visit; and
- the individual interpretations by Team Members in attempting to operationally determine when a standard is met or not met.

Problems Related to Team Members

Experienced Team Chairs have identified common issues that may arise during site visits. Be mindful of these potential challenges to avoid or correct them:

- **Socially Active**: Team Members should refrain from personal engagements during the visit. Daytime commitments are dedicated to the institution, and evening time should be used for team discussions and evaluations.
- **Unprepared**: Team Members should come well-prepared, having thoroughly reviewed all materials. This ensures that the team can engage in meaningful discussions and effective evaluations. If assigned a specific program area, be familiar with relevant standards and resources.
- **Off-Task**: Avoid personal distractions like texting, checking email, or engaging in off-task conversations during designated review times. Stay focused on the review process.
- **Constant Comparisons**: Avoid comparing the program to your own institution. Focus on the program's context and whether it meets the CACREP standards, not how it compares elsewhere.
- **Overly Accepting**: While it's important to recognize a program's strengths, maintain a critical mindset and evaluate areas for potential improvement.
- **Collector**: While it's natural to gather ideas, avoid collecting resources or materials at the expense of the review process. Stay focused on the accreditation task.
- **Debater**: Do not engage in debates with institutional representatives about policies or practices. Maintain objectivity and clarify that your role is to assess the program's adherence to CACREP standards.
- **Non-Collaborative**: Team Members may have differing opinions, but it's essential to work collaboratively to reach a consensus for the final report.
- **Inappropriate Behavior**: Inappropriate or insensitive comments or humor should be avoided. Team Members should always remain professional, reflecting CACREP's standards.
- **Disrespectful of Confidentiality**: Team Members must maintain confidentiality about the visit, including what was discussed, what was discovered, and any recommendations made.
- **Late to Arrive/Early to Leave**: Team Members must be available for the entire visit. Late arrivals or early departures disrupt the team's ability to complete the visit and may affect the report's accuracy.

Problems Related to the Institution/Program

Challenges during a site visit can arise from various institutional or programmatic sources. While many issues can be addressed through pre-visit planning, some may persist. The professionalism and demeanor of the site team are key to navigating these challenges effectively.

Possible Sources of Challenges:

- **Department Chairs**: Some Department Chairs may try to control the visit process due to their investment in accreditation. Team Chairs should inform them in advance if faculty meetings need to occur without administrators present. If difficult issues arise, these should be handled delicately, maintaining confidentiality.
- **Faculty Members**: Rifts among faculty may surface during interviews. Team Members should avoid drawing conclusions from one interview and instead triangulate information from all sources before forming an opinion. Be mindful that some faculty may vent frustrations, but it's important to protect their identities and share information responsibly.
- **Deans/Administrators**: Deans may provide a broader perspective, but team recommendations should be based on accreditation standards, not on changes requested by faculty or administrators unless they align with those standards.
- **Review Materials**: Ensure all relevant materials, including addenda to the self-study, are reviewed before the site visit. The Team Chair should confirm that any voluntary addenda have been sent to both the team and the CACREP Office.
- **Site Supervisors**: Site supervisors may not be aware of the visit or their role in it. Advance planning and communication through the CACREP Liaison can ensure that supervisors are prepared and understand the purpose of the visit.
- **Students**: Faculty may prepare students to focus on positive aspects of the program. Team Members should ask questions to uncover any areas for improvement, such as what students would change or what challenges they face, to gain a well-rounded perspective.
- **Program Graduates**: If a graduate expresses dissatisfaction, it's important to distinguish between personal grievances and programmatic issues. Team Members should balance the feedback with perspectives from other graduates to form a comprehensive view.
- **Interview Questions**: Interviews with faculty, staff, students, supervisors, and administrators should focus on gathering detailed, relevant information. Specific questions can be discussed and delegated during team planning to ensure all areas of concern are addressed.

Sample Interview Questions

Sample Questions for Faculty

- Describe your department's method for conducting practica (or internships) including one-to-one supervision, site selection, on-site supervision, and the classroom component.
- How do you feel about the institution's support of the department? Please explain your answer.
- How were student learning outcomes developed? How are they assessed?
- How are results of these assessments used? Give examples.
- What process does the department utilize for curriculum changes, program evaluation and/or development?
- What do you believe are the major assets of your training program? Major weaknesses?
- How does your department assess teaching effectiveness?
- Explain your department's relationship with the library and/or the computing center.
- How does your department's acquisition of resource materials compare with other departments?
- Explain how information processing resources are integrated into the department in order to accomplish its goals and objectives.
- How does the computer network system on campus affect your overall performance?
- How would you describe your familiarity with the campus/departmental information processing resources?
- For adjunct faculty: What opportunities do you have to participate in faculty in-service/professional development? How do you feel about your relationship with the fulltime faculty?

Sample Questions for Administrators

- What do you believe are the major strengths and weaknesses of each of the Counselor Education programs?
- How do the department's resources compare with other departments? Please explain your answer relative to staff size, budget, facilities, graduate assistants, and information processing resources.
- Standard I.D. states that "The institution provides encouragement and support for program faculty to participate in professional organizations and activities (e.g. professional travel, research, and leadership positions). How does your institution meet this Standard?
- What are the institution's contributions to the department's faculty and students regarding statistical consultation, computer assistance, and funds for data analyses.

Sample Questions for Students

- Was the process of admissions into the program clearly explained in the institution’s catalog and program brochures? Explain.
- Explain the department's process in disseminating materials regarding the program’s objectives, courses, etc. Were the materials clearly stated?
- Explain whether you feel you receive adequate evaluation regarding your development of the knowledge, skills, and attitudes related to the counseling profession.
- Please describe some of the curricular experiences you have had in the program which have enhanced your personal development.
- Explain how access to the library, computer equipment, and counseling facilities affects your overall performance in the program.
- What are your perceptions regarding the helpfulness in obtaining information from departmental faculty, staff, library assistants, computer center personnel, etc.?
- Please describe your understanding of the program's retention policy and the advising process.

Sample Question for Doctoral Students

- Please describe how the curricular experiences you have had at the Doctoral level have increased your knowledge and skills in academic and clinical instruction, clinical supervision, leadership, research, program evaluation and consultation.
- Please describe the opportunities within your program for developing an area of expertise.
- Please describe the opportunities within the program for developing collaborative relationships with program faculty in relation to research and scholarship.
- Please describe your doctoral practicum experience.
- What messages you received and observed in your program about counselor professional identity?
- What are your perceptions about the department’s approach to preparing doctoral students to be effective researchers, teachers, supervisors, and counselors?

Sample Questions for Program Graduates

- Now that you are employed as a counselor, what do you think were the major strengths and weaknesses of the program?
- Explain how the program's ongoing evaluation of your academic performance, professional development, and personal development provided insight into how you would perform in your chosen field?
- Explain what resources/support the institution provided you in your job hunt. Were they satisfactory?
- In what ways did the entry level program provide you with adequate curricular experiences in the core areas?
- Explain how advisement and curricular experiences during your doctoral program helped in the completion of your dissertation.

Sample Questions for Practicum/Internship Supervisors

- What is your evaluation of the students' preparation for the practicum/internship? What strengths do you see? Weaknesses?
- Describe the communication that occurs between you and the program prior to the start of the practicum/internship.... during? and/or near the end of the clinical experience?
- What preparation have you received from the program in order to host and supervise an intern or practicum student?
- When vacancies have occurred in your organization, has your counseling center/school hired graduates of this program? If not, why not?
- Describe the program's expectations for the student's activities during the practicum/ internship.
- Please indicate the number of hours of direct client service you require during the practicum and internship.
- How often do you meet with the practicum/internship student on a one-to-one supervisory basis?

Sample Questions for Library, Computer Center Staff

- Explain the computer network(s) on this campus. How do the computer systems match in the library and the departments?
- How does the informational resource budget for the Counseling programs compare with other departments? How does the department utilize this money?
- How many and which acquisition committees do Counseling program faculty serve on?
- Explain the library's policies regarding accessing off-campus information.

The Exit Presentation

In preparing for the exit presentation, the Team Chair should coordinate with the CACREP Liaison about who should attend and where the meeting will be held. A brief preview of the report's content may help decide who should attend. While the Team Chair presents, it's helpful for all Team Members to review the content beforehand.

The Exit Presentation takes place on the final day of the site visit, after the team has reviewed data, visited clinical sites, and interviewed students, alumni, faculty, and staff. By this point, the team has gathered substantial information, and the presentation serves as an opportunity to share the team's impressions, recommendations, and potential requirements with the program's representatives and administrators.

It's essential that the CACREP Liaison offers the option to invite senior administrators (e.g., president, provost, deans) to the meeting to ensure key personnel are not surprised by the report later and can discuss future resource requests. Their participation also allows the institution to reflect on the visit immediately after the presentation.

The exit presentation is a formal presentation, not a time for additional interviews or debate. All questions should have been addressed during the visit, and the institution will receive a copy of the team's report with the opportunity to submit a formal response. To ensure effectiveness, Team Members should plan and confer beforehand. The presentation should be concise (usually around 30 minutes), covering all necessary findings, with the Team Chair leading the process.

The team's findings—both strengths and areas of concern—should not be a surprise, as the team should have communicated them throughout the visit. If the institution seeks further clarification afterward, the team can politely decline, as the visit is ending.

Tips for the Exit Presentation

- The Team Chair begins by thanking everyone for their participation and contributions to the review, emphasizing that accreditation is a voluntary process initiated by the school.
- State that the team discussed key issues during the visit and provided the program with opportunities to address these issues before the exit presentation.
- Clarify that the exit presentation is not a discussion session but rather an initial overview of the team's findings, which will be compiled into the final report.
- Inform the audience that the program and administration will receive an official report from CACREP, with the opportunity to respond based on information, not on perceptions from the exit presentation.
- Explain that the presentation will cover strengths, suggestions, and areas where the program did not meet standards, with references to the specific standards by item number and wording.
- Outline which programs were reviewed and explain how information will be presented in both the exit presentation and the team's report to the CACREP Board of Directors.
- Clearly state the team's view on both the strengths and weaknesses of the program(s), referencing specific standards. If there are no "Specific Requirements" (standards not met), avoid commenting on them.
- Focus comments on the overall components of the program(s), distinguishing between core standards and specialized practice areas.
- Be candid about any significant concerns. Should the program inquire about their ability to receive accreditation, please note that ultimately the CACREP Board makes accreditation decisions. If the program has questions about the withdrawal process, please direct them to the CACREP office.
- If asked to predict the Board's decision, politely decline, noting that the team cannot anticipate the Board's actions.

- Conclude by thanking everyone again for their time and participation.
- Remind the audience that all information gathered during the visit must remain confidential before and after the accreditation decision is made.

Sample Preface to Exit Presentation

“At the Exit Presentation, the team will try to summarize its observations from the visit to the program. The exit presentation is only a summary and a first attempt to pull together and express the team’s analysis of its on-site evaluation to the institution. The team will prepare a Team Report, and that Report will be sent to you from the CACREP Office soon. It is important that you review the report carefully and use the opportunity to respond to the report, addressing, disputing, or correcting, with factual support, any of the findings. The report is the best and most complete expression of the team’s visit verification process. The CACREP Board, of course, makes the final decision about whether the program is in compliance with accreditation standards. …”

AFTER THE VISIT

Developing the Team Report

The primary purpose of the on-site visit is to provide the CACREP Board of Directors with the necessary information to support their accreditation decisions. A clear and detailed report aids the Board in making informed deliberations. On the final night of the visit, the team discusses each standard to determine whether it is met or not. If the report isn't finalized by the end of the visit, the team should discuss the plan for completing the report, including how and when each team member will review and provide feedback on the draft.

The report is completed on-line via the AMS (cacrep.edvera.com) by the Team Chair. The team will be required to address all applicable Section tabs in the **2024 Standards Site Review Team Report**. For detailed information on accessing the AMS, please refer to The Visitor – AMS How to Guide.

It is important that the final report be submitted to the CACREP Office within two (2) weeks of the visit's completion. The report template is divided into sections aligned with the CACREP Standards and covers both general and specialized practice areas. For each section, the team will identify "rationales" for standards cited not met or partially met, "strengths" and "suggestions."

Reporting on cited standards

The team will address for each cited standard three elements (specify the standard, what was reviewed, and why it's not met or partially met). This turns into the actual written record the team, the program, and the Board will eventually all work from. The table below shows what each element looks like when it's specific enough to act on, versus when it isn't.

Element	Too general	Specific enough to act on
Standard cited	*Faculty qualifications don't meet the standard.*	*Standard 2.C requires sustained engagement in 2 of 4 professional activity areas; faculty CVs show only 1 of 4.*
What was reviewed	*Documentation provided was incomplete.*	*The Self-Study cited CMHC 511 and CMHC 695; review of both syllabi (SSR Appendix C, pp. 44–52) found neither addresses the required content.*
Why it's not met	*Program needs to do better here.*	*No syllabus or curricular material reviewed showed explicit coverage of the*

		required techniques and interventions.

A quick self-check before submitting: could the program and future Board committee draft their own response directly from what's written here, without contacting the team or guessing at what was meant?

Suggestions Section of the Report

When making a suggestion, it should be clearly framed as an opportunity for program improvement. The suggestion must be worded so that program faculty understand its intent and how it can enhance the program. Additionally, the language should be precise enough to convey to the CACREP Board that it is a suggestion, not a statement that conflicts with the evaluation of a particular standard. For instance, a suggestion like, "The team suggests the program faculty ensure the practicum faculty-student supervision ratio is always 1:6" might confuse the Board into thinking the supervision ratio standard is not met, even if the team has marked it as met.

If there are no suggestions for a specific area, leave the section blank—do not state that there are no suggestions. Below is an example of how a suggestion should be framed.

Example - Suggestion

The team recognizes that the ACA Code of Ethics is the code accepted by the state licensure board. The team notes that most of the emphasis in the program is on having students learn and understand the ACA Code of Ethics. Students only receive a basic introduction to specialty codes of ethics. The team suggests that the faculty also encourage more in depth experiences with other counseling codes of ethics for the purposes of discussion and comparison.

Strengths Section of the Report

When citing program strengths, the team should focus on exceptional aspects of the program. Simply stating that the program meets a standard is not an exceptional achievement unless it exceeds the expectations. If the visiting team does not have any strengths to list for any given area, omit this from the report or leave blank; please do not state that there are no strengths.

Examples - Strengths

Administrative support for the program and accreditation is excellent. The Provost, Vice President, and the Dean of the School all expressed pride in the program and faculty and clearly documented their support for the program.

There is an excellent system of orientation, induction and continuous support provided to the adjunct faculty. Each adjunct faculty member is given opportunities to express concerns, attend faculty meetings to allow them to collaborate with other faculty, and are provided with on-going consultation and supervision.