

# PLANNING AND HOSTING A SUCCESSFUL ON-SITE VISIT

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## TIMELINE

Please note that this list does not include deadlines for submitting the QEP, the Compliance Certification, or the Focused Report to SACSCOC.

Things to note before and during the visit:

- Always use the SACSCOC website resources.
- Include your SACSCOC VP and committee chair on all correspondence with every committee member, no matter how small you think the detail.

## BEFORE THE VISIT:

### TWO YEARS

- Read the SACSCOC resources about on-site visits. The Handbook for Institutions Seeking Reaffirmation has a lot of information about on-site visits:  
<https://sacscoc.org/app/uploads/2020/03/Handbook-for-Institutions-Seeking-Reaffirmation.pdf>

#### Hotel

- Start discussion with hotels, visit potential choices, and block off approximate guest rooms and conference rooms needed.
- Explore catering options and technology needs.

#### On Campus

- Reserve rooms on campus for workroom, support room, QEP presentation, and interviews.
- Start discussion with groups **on campus**:
  - Transportation
  - Technology (computers, internet connection, laptops, network access)
  - Dining/Catering
  - Student Ambassadors (for tours, greeting, etc.)
  - Events and Conferences (room set up, building coordination)
  - Campus Security
  - Alert appropriate faculty, staff, and senior leadership about dates for the visit. They should plan to be available during the visit if they are called for interviews.
  - Alert your governing board secretary that the committee chair and SACSCOC VP will want to meet with members—probably the rector and one other. Ask them to hold the approximate dates of the visit. Be aware of your board’s quorum rules.

### ONE YEAR

- Invite your SACSCOC VP for Advisory Visit (optional)
  - Show him the hotel and campus rooms you are considering using for the On-Site visit.

- Reserve hotel guest and conference rooms. You may not have final room count until 6 months prior to the visit. Verify the hotel's cancellation policy for guest rooms.

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## SIX MONTHS

- Reserve copiers, printers, lock boxes or shredders, technology (laptops) for committee, on campus workroom and hotel workroom (these two workrooms should have the same set up).
- Order office supplies for both committee workrooms.
- Order institutional paraphernalia that you intend to give to the committee (e.g. USB drives imprinted with your logo, laptop bags, water bottles, pens and notepads, items of local flavor).
- Start discussion with local restaurants to reserve private committee dinner off campus.
- Prep campus constituencies:
  - Offices that may be visited
  - Student Ambassadors (guides for committee members)
  - All potential interviewees
  - Senior leadership and governing board
  - Transportation chauffeurs
- Identify the point person(s) who will be responsible for sending logistical information on the visit to the SACSCOC VP, committee chair, and committee members. Note this may be a different person than the one who will be responding to any content, additional documentation, clarification or technical issues with the Focused Report.
- Send reminder to all appropriate faculty, staff, and senior leadership about dates for visit. Dates should be set by now, and these constituents should plan to be available during the visit if they are called for interviews.
- Follow up with groups on campus:
  - Transportation
  - Technology
  - Dining/Catering
  - Student Ambassadors
  - Events and Conferences (room set up, building coordination)
  - Campus Security
- Establish and maintain open communication with the committee chair as soon as you know who it is.
  - Contact your committee chair to arrange an orientation call (or pre-visit).
  - Develop tentative agenda with the committee chair's input.
  - Send restaurant choices for off-campus dinners and let committee chair choose.
- Verify reservations of on campus space.

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## SIX WEEKS TO THREE MONTHS

- Send the committee member questionnaire.
- Verify all reservations, finalize details for on-campus and off-campus arrangements.
- Provide briefing sessions for all campus constituencies that will come into contact with the committee.
- Meet with administrators from each area (Resources, Academics, Student Life, etc.) to make sure they know what may be requested from their area.
- Set up orientation meetings with your content experts and others involved in interviews. Prep them on areas of the Compliance Certification that were addressed in the Focused Report.
- Make sure anyone who will be in interviews with the committee has read and has access to the Compliance Certification, off-site review comments, QEP, and Focused Report. Identify the standards that will be addressed in the interviews.

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## TWO WEEKS

### Committee Members and Committee Chair

- Send to committee members personalized confirmation packets:
  - Verify flight information
  - Chauffeur name, cell phone, and times for travel (pick up/drop off)
  - Get any missing information (emergency contact, food allergies) from committee
  - Menu choices as needed
- Request from Committee Chair the committee member's interview list and related principles.
- Be prepared for last minute changes and additions.

### Scheduling

- Schedule committee interviews—assign rooms and interviewees.
- Make arrangements for delivery and pick up of copiers/printers, secure box, and supplies for both committee workrooms.
- Provide personalized schedules for the following groups:
  - Transportation Office and Chauffeurs
  - Catering
  - Building Coordinator
  - Interview Coordinator
  - Technology Support on campus and at the hotel
  - Logistics Group (comprehensive schedule for each member and one for command center)
- Confirm meeting time/date for governing board meeting with committee chair. Be aware of the quorum rules.

## Logistics

- Confirm contact information (cell phones) for all members supporting the visit:
  - Logistics Team (Working Group)
  - Senior leadership
  - Those to be interviewed

### Hotel

- Hotel reservations
- Hotel Events and Conferences
- Technology
- Catering

### On campus

- Event facility coordinator
- Technology on campus
- Catering
- Transportation
- Student Ambassadors

- Identify students and faculty involved in QEP for meeting/lunch with committee.
  - Set up orientation for students/faculty meeting about QEP.
- Collect requested documentation for committee workrooms (catalogs, etc).
- Make plans for crises (e.g. committee chair is delayed, committee member forgets medication, printer not working at the hotel).

## DURING THE VISIT:

### EARLY ARRIVALS (THE DAY BEFORE THE VISIT)

- Greet committee members upon arrival at hotel.
- Hand them their welcome binder.
- Make sure everyone has eaten or has the opportunity to get something to eat.
- Make sure they know to come down to pick up their laptop (if borrowing).
- Give them prepared gift bags that they can use during the visit and then take home with them.  
We gave them laptop bags with the institution's logo. Inside the bags we placed useful marketing items from various offices on campus, such as water bottles, notepads with pens, and luggage tag holders. Make sure items you give are something they can use later!!
- We also provided in the bag bottled water, snack bars, chocolate, and mints.

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## THE VISIT

- Make sure all late arrivals receive welcome packet and gift bags.
- Verify daily with catering on and off campus, transportation, student ambassadors' schedule.
- Be prepared for the committee to call new interviewees or cancel interviews or any other schedule changes.
- Be prepared to have student ambassadors or other guides give a walking tour of campus or to the bookstore. These students can also escort the team members to interviews.
- On the last day of the visit, most committee members will want to leave right after the exit conference. You may provide a "to go" lunch or snacks for them.

## COMPONENTS OF HOSTING

Don't forget that your visiting committee is here to help you. They are volunteers, and in most cases, they are taking time out of their busy schedules to travel to your institution and spend three days researching, interviewing, meeting, and writing. Treat your committee members as honored guests! Anything you can do for them to make their travel easier, their work faster, and make them feel comfortable is always very much appreciated. Try to imagine yourself in their position. What would make you feel more at ease from the time you arrive at the airport to the time you catch your flight home?

## CONFIRMATION PACKET

A confirmation packet sent a few weeks before the visit can help to put your committee members' minds at ease about traveling, arriving to the correct destination on time, and the entire trip in general.

- Send committee members the Committee Member Questionnaire: This should go to all committee members, the committee chair, any observers, and your SACSCOC VP as soon as you know the final list of committee members. The request can be sent by online survey to expedite the response time but should have the option of printing and faxing, emailing, or mailing back. The committee member information request form should include:
  - Name, Title, Institution
  - Preferred Contact Information
  - Emergency Contact Information
  - Technology Needed for the Visit (e.g. a laptop: Mac or PC)
  - Dietary Restrictions and Preferences (Pay strict attention to allergies or intolerances, but if you can also provide favorite snacks or meal items—this is a nice touch)
  - Accessibility Requirements
  - Travel Arrangements (e.g. flying or driving, flight numbers arrival and return, if driving would you like us to provide directions)
  - Other needs (e.g. special sleeping arrangements such as allergic to down)

- Send personalized confirmation packets to each committee member about two weeks prior to their visit. Include:
  - Welcome letter
  - Map of airport where traveler will arrive or driving map and directions
  - Name, cell phone, and picture of chauffeur picking up traveler (if flying) and a picture of the vehicle the chauffeur will be driving
  - Confirmation of traveler's flight number (if flying) and arrival time
  - Information on the hotel where they will be staying (amenities, website), approximate check-in time and confirmation number of reservation
  - Pictures and cell phones of logistics team member(s) who will meet them at the hotel to assist with check-in/arrival
  - Information on what to expect when they arrive at the hotel including how/when they will receive their laptop (if they are borrowing one) and internet access
  - List what will be provided during their visit (e.g. transportation, laptop/internet access, food, name badge, etc.)
  - Tentative committee visit schedule (mention that all times are tentative depending upon the committee's needs)

## WELCOME BINDER

Prepare a personalized welcome binder/packet for each committee member to be provided upon arrival at the hotel. Once they have gone to their room to drop off their luggage, the committee members may come back to see the workroom, to meet the IT person at the hotel, and set up their laptops and internet (and pick up their laptops if borrowing.) Include in the binder:

- Instructions for accessing the internet and IT assistance at the hotel and on campus.
- UBS flash drive for use during their visit (and to take home with them)
- Name badge
- Committee Schedule
- Personal Schedule which includes interviews
- Names, roles, and contact information (photos if available) of all assisting with on-site visit (especially chauffeurs, logistics team, technology coordinators)
- Names, titles and photos of all Senior Leadership
- Description and menu of restaurant for private off campus dinners
- Dinner options for the date of arrival (if committee members are arriving the night before)
- Map of hotel
- Map of campus
- Map of campus building where interviews will be held

## TRANSPORTATION

Work with your Transportation Office to coordinate all transportation for committee members from the time they touch down at the airport to the time they return to the airport for departure, or from the time they arrive at the hotel if they are driving.

### CHAUFFEURS

- Reserve chauffeurs for airport pickups and one for transport between campus and the hotel (preferably the same driver during their entire stay) available any time, on call.
- It might be nice to provide pictures of your chauffeurs and the vehicles that will be used to pick up committee members at the airport. Although with last minute changes in drivers or arrival times, this may not be feasible. Provide cell phone numbers of the chauffeurs for the committee members.
- It's best to have designated chauffeurs who will always be driving the committee and who have no other obligations. The visit schedule will change frequently.
- Make sure chauffeurs are positive about your institution.

### TRANSPORTATION DETAILS

- Make sure you arrange for travel:
  - from the airport
  - from hotel to campus
  - to dinner off campus
  - any campus driving tours
  - from the campus exit conference to the airport
  - to an OCIS if needed
- About a week prior to the visit, meet with your transportation office to go over the entire schedule to anticipate any problems or conflicts. Have them verify routes from the airport to hotel to campus and any other destinations such the restaurants and an OCIS.
- Ensure all vehicles are accessible for committee members. Ask about any special accessibility/mobility needs in your information request to the committee members. Even if no committee member specifies accessibility needs, consideration should be taken to provide a vehicle that is easy to get into and out of.
- Make sure drop-off points on campus are accessible during busy traffic periods on campus. Try to have the committee members dropped off at the door of the building they will be in.
- Opt for larger vehicles with more space. For instance, don't use a sedan to transport 4 people with luggage. The committee will most likely be carrying laptops and documentation with them and a smaller vehicle will be uncomfortable.
- Be prepared for travel for emergencies (to pharmacy, to shopping center, or back to hotel.)
- Assume the committee will always travel as a group, but make sure you have transportation standing by if one or a few need to split from the group.
- Have a plan to have the chauffeur take the committee on a driving tour if they ask for it. The committee will most likely not have time to take a walking tour (such as you give to prospective

students and families) but may want to see the layout of the campus. A drive through campus on the way to the interview rooms is a nice way to accomplish this.

- Consider providing alternate walking transportation for committee members with limited or difficult mobility, such as a golf cart to get to other areas of campus.
- On the last day of the visit, most committee members will want to leave right after the final meeting. Plan to transport committee members to the airport immediately following the exit conference. It is nice to have their transportation waiting for them at the door.

## **HOTEL**

Visit the hotel before booking any rooms—this may need to be done up to two years in advance. The SACSCOC VP may want to see these rooms during his/her advisory visit. Look at the conference rooms and make sure they will be sufficient for the committee workroom and support room. The committee will need internet access in the workroom.

- Set up billing ahead of time so all charges (that your institution can legally pay) are billed to you.

### **GUEST ROOMS**

- Give hotel information on guests (number of guests, arrival date/time, any special needs). Guest rooms should include a desk or a small work area with internet access.
- If possible, check with the hotel to see if other groups will be there at the same time. Try to get your committee housed in a quiet section of the hotel.
- You may want to consider housing your institution's technology assistant and a logistics person at the hotel.

### **WORKROOM AND SUPPORT ROOMS**

- Discuss with the hotel your needs for the committee workroom and support room set up.
- Arrange for two rooms; one for the committee workroom and one for your support room that will serve as a snack/lunchroom and lounge. You can use the support room when committee members arrive as the IT meeting room.
- The committee workroom will need to be secured (locked) at all times, especially when the committee is not using it. Committee will need to be able to access this room 24/7. Arrange for hotel members to enter the workroom only when committee is present.

### **HOTEL CATERING AND RESTAURANTS**

- Based on the instructions from the committee chair, arrange for lunch, dinner and snacks.
- The committee will eat at least one lunch at the hotel in the workroom (orientation/opening meeting).
- Have refreshments including drinks and snacks available in the support room.
- If the hotel does not provide breakfast or have a restaurant, you may wish to provide breakfast items (coffee, fruit, yogurt, breakfast bars) to be available in the support room.

### **HOTEL TECHNOLOGY**

- Arrange for and test all technology at the hotel: laptops, printers, internet connections.

- The committee should have 24/7 tech support available provided by your institution or the hotel.

## CAMPUS LOCATIONS

If you can, reserve sufficient rooms in a building to house interview rooms, committee lunches, committee workroom, and logistics staff workroom. It is nice to try to have all interviewees come to the same building so the committee members do not have to waste time traveling around campus to interview. If the committee wants to see the campus, they will ask for a tour. Be prepared to give one if asked, but don't plan one into the schedule unless asked prior to the visit.

- Don't forget to consider any accessibility needs (for the committee and your interviewees) when planning room set ups and assigning rooms.
- Schedule who will set up each room and when.
- Assign rooms for specific purposes (i.e. interview rooms, committee workroom, command center.) Keep a list of all rooms being used in the command post.

## WORKROOM

- The workrooms should be big enough to allow the committee to work as well as conduct meetings.
- For the committee workroom, a boardroom style may be best suited for the committee's work.
- Ensure the workroom is technology friendly (extension cords for charging laptops and phones, internet access.)
- The committee workroom will need to be secured (locked) at all times, especially when the committee is not using it.
- Ask the committee chair if he/she will want projection equipment in the workrooms.
- Printer (copier, scanner) – consider all possible ways a committee member may want to print and plan for them. Be aware that your network services may not allow others to connect wirelessly to a printer. In that case, have options to use USB drives or cables.
- Count and make sure there are enough power outlets, and if not make sure you have enough surge protectors and extension cords. Don't forget safety: If you use surge protectors and extension cords, you should also tape down or use a cord concealer to cover all loose cords and wires.
- No one should enter the workroom except when committee is present.
- Collect requested documentation for committee workrooms:
  - Catalogs
  - QEP
  - Compliance Certification and Focused Report
  - Institutional marketing and recruiting brochures
  - Specific documentation requested by the committee
  - Student complaint logs
  - Written responses to third parties (if your institution has any)

## **SUPPORT ROOMS**

- Choose a location for the support room close to committee workroom. You want to be easily accessible.
- Assign point person(s) for:
  - Document and evidence requests
  - Interview changes
  - Any other committee needs
- Make sure your support room has
  - contact information for all members of the working group, assisting departments/offices, committee members, logistics, and all interviewees.
  - Post a visit schedule in the room. A white board is perfect for this so the schedule can be updated as things change (and they will.) Immediately alert those who are affected when the schedule changes.
  - Keep a list of all rooms and buildings being used during the visit.
  - refreshments for your interviewees, point person(s) and logistics group. Most of these people will be in interviews and meetings all day and refreshments are a nice way to say thank you for your support of the reaffirmation process.
  - Have a first aid kit available and emergency contacts for rescue, fire, and police.
  - Logistics binder (or copies of information needed). The logistics binder should be organized so that anyone can look up information. Include information on all visit schedules, interviews, contact information, committee member information from questionnaire (including food preferences and allergies), technical assistance, meeting room set up, hotel conference room, hotel contacts, hotel catering, transportation, and exit conference invitees.
- The support room should have space to prep interviewees and to do a post-interview debriefing. The debriefing allows the interviewees an option to let the point person(s) know what most of their interview discussion was about and to give a “heads up” on any issues that may have come up during the interview. For example, if the committee member asked the interviewees about Student Complaint Logs but none of the interviewees could answer sufficiently, the point person can then make arrangements for the committee member to see the complaint logs and the people who review them. Debriefing also allows the point person(s) to identify any themes or areas of lacking evidence. If your institution can provide answers to the committee members while they are there on their visit, it lessens the chance of you receiving recommendations. Being proactive to the committee’s questions can help you do this.
- Your logistics people, technology assistants, and point person(s) will need to plan to stay in or near the command center during all times the committee is on campus.
- Plan to have snacks and refreshments available in a dedicated space separate from the workroom such as the support room or another space available to the team and interviewees.

## **INTERVIEW ROOMS**

- Plan to give each committee member a room to conduct interviews. That way they won’t have to get up and move around the building (again saving time for them.)

- Make sure each room is set to be most conducive to that room's purpose. For interview rooms, consider using more casual furniture such as several chairs and sofa around a central coffee table.

#### **OPENING MEETING AND QEP PRESENTATION ROOM**

- Have your campus president/CEO designate who will attend the opening meeting and QEP presentation. These may be back-to-back events and will be easier if the same group is invited to both events.
- Send invitations to the events.
- Arrange for light refreshments.

#### **TECHNOLOGY**

- Make sure all rooms are technology friendly.
- Test all technology (laptops, printers, internet connections) at all locations you know the committee members will be visiting on campus.

#### **PREPARING INSTITUTION CONTACTS**

- Meet with and prep individuals who provide transportation to the committee and go over the entire schedule to anticipate any problems. Map out routes from the airport to hotel to campus to any other locations.
- Prep executive team and president's office for meeting the committee.
- Meet with administrators to outline what will be needed from their unit.
- Students are often good campus guides to take committee members from the campus workroom to interviews and other appointments on campus, and committee members thoroughly enjoy meeting your students. Make sure these students know your QEP! Give students a room in the building with the command center and committee workroom and have several students available to walk committee members to an interview or wherever they need to go.
- Meet with all front-line staff. Emphasize the impression that they will make. Explain that if they are asked for documentation, how they should respond (write the details of the request and who/where it should be delivered, then get the requested documentation to the accreditation liaison ASAP).

#### **TECHNOLOGY**

- Computers – be prepared to provide laptops (or computers for every location) to any committee member who does not want to bring their own.
- Coordinate technology with the hotel tech liaison. Make sure the committee will be able to access everything from the hotel that they can access on campus.
- Internet connection: Ensure the committee members have internet access everywhere they may be working (i.e. the hotel conference room, the hotel guest rooms, everywhere on campus).
- Make sure you test all laptops, printers, and internet connections at all locations you know the committee members will be visiting on campus and at the hotel.

- USB drives – Provide something the committee members can use to store and transport information from one workroom to another or take with them when they are in interviews.
- The committee should have 24/7 tech support available. You may want to consider housing your technology assistant and a logistics person at the hotel.
- If using the hotel technology (internet access, printing, etc.) make sure you know the support process if something is not working. For example, does the hotel have tech support on premises 24/7 who can fix it immediately?

## CATERING

### HOTEL

- Based on the instructions from the committee chair, arrange for lunch, dinner and a.
- Provide hotel catering with a spreadsheet of all events needing catering, date, time, number of guests, location, special requirements, and dietary restrictions.
- Work with hotel catering to plan for the meals provided at the hotel.
- The committee will eat at least one lunch at the hotel in the workroom on day one and one dinner.
- Plan for a variety of snacks (including fresh fruit); hot (coffee and tea) and cold drinks; and bottled water to always be available in the support room.
- You may request a small refrigerator to keep drinks or other items cool.

### ON CAMPUS

- Provide catering with a spreadsheet of all events needing catering, date, time, number of guests, location, special requirements, and dietary restrictions.
  - Snacks and beverages in workroom, support room
  - Light refreshments in the opening meeting and QEP presentation space
  - Governing board lunch
  - Lunch with students
  - Lunch or afternoon tea with faculty
- Your catering department will have suggestions for each event such as Board member preferences and student favorites.
- Plan for the committee to split into three groups for lunch on day two so committee members can meet with the governing board and groups of faculty and students to chat about the QEP and other aspects of your institution.
- Plan to provide a variety of snacks (including fresh fruit); hot (coffee and tea) and cold drinks; and bottled water in the support room or other dedicated space.
- Be sure to consider dietary restrictions when planning meals.

## OFF-CAMPUS DINNERS

- Some committee members will be arriving the evening before the visit. The institution should offer those committee members who are on site by dinner time (6:00 pm) an opportunity to eat together at a local restaurant, even though the rest of the committee has yet to arrive.

- The committee will need to meet at least once for dinner off campus, but you should plan for two nights. Find a restaurant with a private room or one that can arrange tables for privacy. The dinners may be more social in nature, but the committee should have the option to hold a working dinner should they need to. They (and you) do not want any details of their conversation being overheard.
- Pre-scan all restaurants where the committee will be eating. Local restaurants are nice, but make sure the menu includes something that all committee members can eat (considering dietary restrictions.)
- If your team will be visiting an OCIS, discuss options for dinner with the committee chair.
- Discuss with your SACSCOC VP ahead of time how the bill will be paid (will VP use their SACSCOC travel card, can restaurant direct bill the institution?)

#### OFF CAMPUS INSTRUCTIONAL SITE VISITS

- Off campus instructional site visits will be determined prior to the on-site visit. If an OCIS visit is necessary, you will need to work with the committee chair and your SACSCOC VP to coordinate the visit.
- Remember to reserve a chauffeur and make plans for a meal as needed.

#### EXIT CONFERENCE

- The exit conference will be held at the hotel.
- Be sure to reserve a separate room for the exit conference or have the support room at the hotel reconfigured for this event.
- Consult with the committee chair as to the time and desired configuration of the room.
- Have your campus president/CEO designate who will attend.
- Send invitations to the event.
- Keep the logistics of this important meeting simple as committee members typically depart immediately following the exit interview.
- Provide light refreshments for all guests and optional boxed lunches for committee members to travel with.