# Site Visit Agenda Template

## Instructions

The program director has the central responsibility for creating the site visit agenda. It will need to be created, however, in consultation with the site surveyors. Because some programs have multiple campuses, there is variation as to how the agenda is designed, but the template will provide you with a good foundation for setting up the agenda.

There are, typically, two possible options:

**Option 1:** One and a half day visit with two surveyors for one program on one campus

**Option 2:** Two-day visit with three or four surveyors for a multiple campus program, with a main campus and one or more branch campuses

In designing this schedule/agenda, the program director should consult with the Team Coordinator and remember to allow time for lunch, breaks, and dedicated work times. In addition, there should be times scheduled throughout the visit for the program director and the surveyors to have catch-up chats. It is perfectly permissible for the program director to schedule working lunches for meetings.

The program director should share the draft of the agenda two weeks prior to the site visit to the SharePoint site so that the site surveyors can review and comment.

**Virtual Participation**: Some of the meetings that you set up might be hybrid, while others, such as the Advisory Committee meeting, might be virtual. For meetings with a partial or complete virtual environment, there cannot be any unannounced participants, recordings, or legal counsel. In addition, you should ensure that the internet is able to support the meeting and that all the necessary software programs are fully updated, so that valuable time is not wasted.

Finally, institutional participants (administrators and faculty) are required to use the camera when they meet with the Site Surveyors. Video presence is encouraged and recommended for graduates and the Advisory Committee, but it is not required, as some offices might not allow that.

## Required Meeting Participants/Activities

**NOTE FOR MULTIPLE CAMPUS PROGRAMS: The Site Surveyors will need to meet with the following people at the branch campuses: Faculty, Practicum Coordinator, Students, and Graduates. The surveyors can be separated into two groups to achieve these goals.**

**List of Program Participants:** Either within the final agenda or as an attachment that is shared with the site surveyors at the site visit, the program director should include a list of the people attending each meeting. While there may be some students, graduates or advisory committee members that cannot confirm attendance ahead of time, the program director should include on the list all the people who have been invited.

* Program Director (initial 45-60 minutes, with follow-up throughout the visit)
  + The team will meet with the program director at the beginning of the visit for a private interview.
  + It is strongly recommended that another meeting be set up for the program director (and other instructional staff, if applicable) and the survey team for general questions, collegial conversation, and camaraderie.
* Opening Session: Administrators and the Program Director’s direct supervisor. (45-60 minutes, depending on number of participants and institutional representation) Typically, the President (depending on the schedule), the Vice President of Academic Affairs, the Program Director’s Supervisor attends the meeting. In addition, you can invite the Dean of Students, Head of Admissions, Director of the Library, Director of Student Support Services and other relevant members of the community who support the medical assisting program.
  + Program director attends
* Students (30 minutes)
  + If you have several cohorts in progress, the Site Surveyors will need to meet with students at different stages of the program (This may be done in separate meetings).
  + If you have just one cohort in progress, the Site Surveyors will meet with just that one cohort.
  + Program director or designated person introduces the students and then leaves
* Graduates (30 minutes)
  + You can bring the graduates to campus or arrange for a phone/video conference
  + Program director or designated person introduces the graduates and then leaves
* Faculty and other instructional/administrative staff in the program (30 minutes)
  + Program director or designated person introduces the faculty and staff and leaves
* Curriculum Review Meeting: Program Director and Faculty (90-120 minutes)
  + There is an in-depth discussion of the curriculum, with a review of different sections of courses or one complete course.
  + The PD and faculty need to be available to discuss the curriculum samples and the whole curriculum.
* Advisory Committee (60 minutes)
  + This meeting can be either a hybrid or virtual meeting.
  + Program director can attend to conduct an Advisory Committee meeting during the site visit.
  + Site Surveyors need time with the Advisory Committee without the Program Director and other institutional representatives.
* Medical Assisting Facility Tour (60 minutes)
  + Most of the time will be spent in the lab reviewing the supplies and the equipment.
  + The Site Surveyors will need to see faculty offices and medical assisting classrooms.
  + If there is time, a quick 15-minute tour of the campus resources, such as the library, student services area, and Student Center can also be covered.
  + This will be conducted by the Program Director or a designated faculty member.
* Meeting with Program Director and Program Director’s Supervisor (30 minutes): This session is designed for the Site Surveyors to share their findings with the Program Director and Supervisor.
* Exit Interview: Administrators and the Program Director’s direct supervisor. (20 -30 minutes, depending on number of participants and institutional representation) Typically, the same people who attended the opening session attend the Exit Interview, depending upon availability.
  + Program director attends

Possible Conversations—Do not set up meetings without consulting with the Surveyors

* If the surveyors have questions, they might ask for a quick 15-minute meeting with the academic support staff (library, tutoring, and so on) or the student support services (financial aid, admissions, and so on).
* If the surveyors have questions, they might ask for a quick 15-minute meeting with the Program Director’s Direct Supervisor

## Template for Site Visit Agenda

MAERB Office Contact

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**Program Director name, phone, and email:**

**Survey Team names, phone, and email:**

***Team Coordinator:***

***Team Member:***

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#### Evening before Survey Day 1

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| Early Evening | Surveyors meet at the hotel to finalize their preparations. |

#### Survey Day 1

Rows can be added as necessary and please remember to include a 15-minute break in the morning and afternoon for bathroom/coffee breaks

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| First Thing in the Morning/TBD | * Program director or designee brings the surveyors to the campus. |
| First meeting | * Program director individually meets with the surveyors. |
|  | * Opening session with administration (program director, immediate supervisor of the program director, and additional members from the institution, as desired.) |
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| 5:00 pm/TBD | * Program director or designee transports surveyors back to the hotel. |

#### Survey Day 2 (Typically ½ day)

Rows can be added as necessary. For programs with multiple campuses, there is more time required, and it will be necessary to add in more rows and fill up the afternoon of the second day. The majority of the site visits, however, will end by noon on the second day.

On the second day, the surveyors will need some working time to finalize their findings, prior to the Exit Interview. In addition, there will be time to sit down with the Program Director to catch up on some items that might need to be found.

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| 8:00 am/TBD | * Program director or designee picks up surveyors from the hotel. |
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| TBD | * Surveyors meet with the program director and her/his direct supervisor to review the findings prior to the formal Exit Interview. |
| TBD | * **MAERB’s Exit Meeting with administrators, program director, and other members from the institution, as desired.**    + Program director attends |
|  | * Program director or designee transports surveyors to the airport/hotel |