



Council on Social Work Education
Department of Social Work Accreditation
Commission on Accreditation

Virtual Visit Guidelines & Tips

CSWE's priority is the health and safety of its program members, volunteers, social work faculty members, staff members, students, and field personnel, as well as the clients, constituents, and communities they serve daily across the nation. To ensure the safety of our volunteer visitors and program constituents, the COA has determined that the *option* of virtual site visits is extended through February 28, 2022 for programs under review for reaffirmation and candidacy processes. The decision by the site visitor, the program, or both is sufficient for the visit to be conducted virtually. *The virtual visit option may be extended by the COA as the COVID-19 pandemic warrants.*

The U.S.-based Centers for Disease Control (CDC)¹ recommends that business travelers:

- use videoconferencing for meetings when possible;
- consider adjusting or postponing large meetings or gatherings;
- assess the risks of business travel.

The goal of conducting virtual site visits is to continue advancing quality social work education through regularly scheduled accreditation reviews. A virtual site visit may be scheduled by the COA in cases such as:

1. A manmade or natural disaster, or other public health emergency, prevents the onsite visit from occurring safely for all parties.
2. A modified site visit was issued by the COA.
3. Other emergency or special circumstances at the discretion of the COA.

Guidelines:

1. The process and expectations of all parties during a virtual visit are parallel to an in-person visit. The major changes to the process include: eliminating travel accommodations and reimbursement of sundry expenses, arranging meetings to accommodate all participants' time zones, and ensuring participants have access to the technology and materials needed to guide content discussions.

¹ Centers for Disease Control (2020). Keeping the workplace safe: Encourage your employees to...from <https://www.cdc.gov/coronavirus/2019-ncov/downloads/workplace-school-and-home-guidance.pdf>

2. All current policies and procedures remain in effect, including program constituents/stakeholder groups with whom the visitor is required to meet.
 - a. All accreditation-related documents should be in Word Document or searchable PDF format. Scanned and cloud-based documents will **not** be accepted per section 1.2.11. *Document Submission Policy* in the [EPAS Handbook](#).
 - b. Candidate programs at Benchmark 1 refer to sections 3.3.8. *Commissioner Visit I*, 3.3.9. *Commission Visitor Completion of the Benchmark I Review Brief*, and 3.3.10. *Program Response to the Benchmark I Review Brief* in the [EPAS Handbook](#).
 - c. Candidate programs at Benchmark 2 refer to sections 3.4.5. *Commissioner Visit II*, 3.4.6. *Commission Visitor Completion of the Benchmark II Review Brief*, and 3.4.7. *Program Response to the Benchmark II Review Brief* in the [EPAS Handbook](#).
 - d. Candidate programs at Benchmark 3/Initial Accreditation refer to sections 4.4. *Commissioner Visit III* and 4.5. *Initial Accreditation Review Brief and Program Response* in the [EPAS Handbook](#).
 - e. Reaffirmation programs refer to sections 2.3. *Letter of Instruction, Site Visit Planning, and Site Visit Hosting*, and 2.5. *Site Visit Report and Program Response* in the [EPAS Handbook](#).
 - f. Visitors and programs refer to section 1.2.14. *Conflict of Interest Policy* in the [EPAS Handbook](#).
3. The virtual visit must occur via an engaged and interactive videoconferencing format. Videoconferencing technology should allow real-time visual and audio participation by multiple participants simultaneously. The program selects the platform and serves as host of all meetings.
4. The program and visitor may jointly choose to schedule a typical **full one-day** visit or opt to complete the visit over **two consecutive half-days**. The visit must take place during usual program business hours (Monday-Friday) to ensure participation of all stakeholder groups.
5. The meetings must be conducted in private meeting rooms and may not be recorded by any party.
6. To prepare for the visit, the visitor and the primary contact arrange a meeting, go through the visit agenda point-by-point to negotiate how each segment of the visit will occur, and revise the agenda to include the negotiated details (i.e., who will host the videoconference meetings throughout the day, including with the

President; how all parties, such as students, faculty, administrators, staff, alumni, advisory boards, etc. will be included; how all necessary contact information will be exchanged, etc.). It is helpful to conduct this agenda setting meeting via the same videoconferencing platform the program plans to use to host the visit. This allows both parties to become familiar with the technology.

7. The revised agenda and details of the visit must be in writing and emailed by the program's primary contact to the visitor. The final agenda should be adhered to as much as possible. Afterward, this agenda must also be included in the visit report submitted to CSWE's COA.
8. Should a technology failure occur that impairs the visitor from fulfilling their duties in a timely manner, the visit may be rescheduled. Programs and visitors shall adhere to the policies in the [EPAS Handbook](#) regarding emergencies during visits. In the event of an emergency, Senior Team Leader, Anna Holster (aholster@cswe.org), serves as the point of contact begin resolution.
9. The visit report will still be due two (2) weeks after the visit, and the program will still have two (2) weeks to submit a program response once the Accreditation Specialist sends the visit report to the program.

Tips for a Successful Virtual Visit

Before the Visit:

- No later than 30-days prior to the visit, the program must e-mail the visitor the required accreditation documents; benchmark documents for candidate programs and the self-study for reaffirmation programs.
- Review the LOI and program materials in advance of the visit. If needed, schedule a consultation with the program's Accreditation Specialist to discuss the content of the LOI/program materials.
- Review the *Site Visit Report Template*, sent with the LOI, which explains role, scope, and ethical boundaries information.
- Review [the site visit resources on the CSWE website](#) such as a *Sample Visit Agenda* and *General Questions Bank*. For site visitors, the most current version of the *Site Visitor Training Manual* (dated September 2019) is housed on the [CSWE Learning Academy](#). Once logged in, navigate to 2015 EPAS Site Visitor Training > Handouts.
- The program selects the videoconference platform (Zoom, WebEx, GoToMeeting, Teams etc.) and shares platform details in advance to ensure all participants have the necessary software installed on their device prior to the visit.

- The program arranges a series of videoconference meetings for each participant group rather than one long meeting. This allows both the visitor and participants to take scheduled breaks, reflect, and outline the visit report.
- If possible, password protect the meeting in advance to ensure privacy.
- The program creates and shares a comprehensive agenda which includes the videoconference info as well as the names, credentials, and titles of program participants for each meeting centralized in one document.
- The program may send calendar invites to the visitor and include the videoconference info as well as the names, credentials, and titles of program participants. When calendar scheduling be aware of time zone differences and prepare accordingly!
- Temporarily, the program may send documents/visual aids to the visitor and all participants in advance of the visit that aid content discussions.

IMPORTANT NOTE! Programs should **not** provide the visitor with a formal written response to the LOI. The visitor collects the clarifying information as directed in the LOI via **discussion** with program stakeholders. Visitors should **not** collect nor submit to CSWE's COA any documents provided by the program. The program will embed documents furnished to the visitor in their formal written response to the visit report.

- Visitors and primary contacts may exchange cell/work phone numbers to text or call if there are any issues or technical problems.
- It's helpful for the visitor and primary contact and to have two screens or two devices. One screen for viewing the participants and one screen to have the documents or visual aids open in front of you. With two devices you can also use one to take notes and the other to be in continuous contact with the program personnel and stakeholders.
- Independently, all parties should test the videoconference platform in advance of the visit to avoid tech glitches, test your microphone, test your video, and enable a virtual background if desired. Use the typical "travel" day before the visit to test the technology.
- Select a private, distraction-free, and low noise area to participate in the videoconference. When possible use a device that places the camera in a stable location at eye-level, to replicate in-person meeting dynamics.

During the Visit:

- All parties should enter the videoconference a few minutes early to avoid tech glitches, test your microphone, test your video, and turn on a virtual background if desired. It is also helpful to turn phones and/or computer notifications on silent while meetings are in-session.
- If possible, lock the meeting once all participants have arrived to ensure privacy. To the extent possible, the program's primary contact must limit participants to only those included on the agreed upon visit agenda.
- If the program plans to have multiple participants in the same location/room sharing a microphone, have an IT professional present to ensure the microphone picks up everyone well enough for the visitor to hear.
- When the primary contact is not in a meeting, such as with students and/or community members, have an IT professional present to monitor and intervene if tech issues arise. There is no time in these meetings to troubleshoot.
- If there are multiple people joining from multiple locations, instruct all participants to mute their microphones until they are prepared to speak.
- Be present! Encourage participants to minimize potential distractions and avoid multi-tasking. It is helpful to keep your eyes focus on the screen, speak clearly, engage in discussions thoughtfully, use active listening, and avoid interrupting.
- When possible, deter from using the "chat box" as a way to contribute substantively to the conversation. Engage verbally. Consider limiting the use of the chat box to sharing visual aids that serve to deepen and enhance the discussion with the visitor and all participants.
- For each meeting, the program should facilitate introductions. It may also be helpful to briefly state the focus of each meeting to remain on task.
- To build rapport and trust, it can be helpful to ask participants to identify a strength of the program and an area for growth.
- The program may appoint a facilitator to help keep time, encourage relevant participants to speak, and redirect the conversation to the focus/topic as needed.
- To bridge a silence, consider posing a question directly to a relevant individual.

After the Visit:

- All current post-visit policies and procedures remain in effect.

We are continually encouraged and inspired by the flexibility and creativity programs and volunteers have shown as we respond to a global pandemic. As a peer-review

process, we cannot accomplish our accreditation work without the dedicated service of our volunteers. To our visitors, thank you for your contributions to CSWE and the COA!

*Special thanks Dr. Tom Gregoire, Dean, The Ohio State University & COA
Commissioner for contributing to this knowledge base.*