

Board of Accreditation (BOA) Department of Social Work Accreditation (DOSWA) Baccalaureate and Master's Social Work Program Accreditation

Site Visit Policies

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Overview of the Site Visit

Site visits are an integral step of the reaffirmation process. During the site visit, programs host a site visitor and clarify outstanding questions from the CSWE Board of Accreditation (BOA). Site visitors operate under the authority of the CSWE-BOA and visit accredited social work programs to gather information related to the Educational Policy and Accreditation Standards (EPAS) based on questions provided by the BOA.

Prior to the site visit, the BOA reviews the program's self-study and sends a Letter of Instruction (LOI) to the site visitor specifying the accreditation standard(s) the visitor should discuss with the program. This ensures the visit is focused and guided by the initial BOA review and subsequent questions.

Following the visit, site visitors submit a comprehensive, objective, and thorough report of their findings, to which the program provides a response. The LOI, site visit report, and program response to the site visit report inform the BOA's final reaffirmation decision.

Site Visitor Appointment

Site Visitor Eligibility

To apply, an applicant must:

- be a full- or part-time social work faculty member at a CSWE-accredited or candidate social work program;
- be an active CSWE member (included with program membership);
- possess at least three years of teaching experience in a CSWE-accredited social work program; and
- be willing to conduct at minimum one site visit every two academic years.

Application

Eligible applicants interested in becoming a certified site visitor must complete the site visitor application during the application window.

Each year, a call for volunteers is announced by CSWE and applications are open in April for approximately one month.

Within the application, individuals will:

- respond to a brief set of questions (including a statement of interest);
- upload their CV; and
- upload a letter of support from the program's chief administrator (e.g., dean, chair) documenting support of the time necessary to devote to site visitor trainings and commitments
 - If an individual completing the application is the program's chief administrator, a letter of support should be provided from an institutional administrator (e.g., provost).
 - The letter should demonstrate the program's support for the individual applying, especially for the time commitment needed for site visitor training, preparing for visits, and conducting visits.

Application Review and Selection

CSWE accreditation staff evaluate applications via a multi-stage review based on applicant qualifications and to ensure a diverse and well-rounded site visitor pool. During the review and selection process, staff considerations include, but are not limited to the letter of support, statement of interest, number of visits in the upcoming reaffirmation cycle(s), geographic diversity, institutional auspice (e.g., minority-serving institution, research/teaching focus), social work program options, size, and program foci.

Appointment

Site visitors are appointed to a 3-year term of service, with the option to renew their appointment at the expiration of the term.

Site visitors are expected to conduct at minimum one site visit every two academic years, however, many site visitors conduct one to two visits per year based on need and availability.

A site visitor may be appointed if they plan to retire within their term of service, as long as the applicant meets eligibility requirements at the time of application.

Training

Once appointed, site visitors are required to participate in site visitor training before being certified. Periodic training may be required of site visitors to remain current on the EPAS, BOA interpretations, and/or site visit operations.

If a site visitor has not visited a program for 2 years, the visitor will need to be retrained before being assigned a visit.

Recognition

Certified site visitors will receive a certificate after completion of training. Site visitors also receive letters of recognition each year they conduct a visit and at the conclusion of service.

Conclusion of Service

Planned Conclusion

A certified site visitor's service ends at the conclusion of their appointment term (3 years), unless the individuals reapply for another 3-year term. For example, if a site visitor is appointed July 1, 2023 – June 30, 2026, and would like to continue their service, they must reapply when the application window opens in spring 2026.

If a site visitor would like to take a break from volunteering as a site visitor at the completion of their appointment term, the site visitor is able to reapply at the next available application cycle.

A site visitor who has retired since their term ended no longer meets the eligibility criteria to be a certified site visitor.

Unplanned Conclusion

When a site visitor chooses to end their service before the completion of their appointment term, the volunteer must inform the <u>accreditation volunteer coordinator</u>. The individual can reapply when the next application cycle opens if desired.

The CSWE Executive Director of Accreditation and Associate Director of Accreditation Operations have the right to remove site visitors from service based on violations of site visit conduct, integrity, or performance.

Site Visitor Ethical and Behavioral Expectations

Site visitors operate under the authority of the CSWE-Board of Accreditation (BOA) and are required to serve under a code of conduct that includes ethical and behavioral expectations.

Upon accepting the site visitor term of service each site visitor is required to attest to and abide by the *Site Visitor Ethical and Behavioral Guidelines* to ensure that the duties of the site visitor are carried out fairly, impartially, confidentially, and responsibly by avoiding actual or apparent conflicts of interest and other improprieties. Adherence to these guidelines is essential to maintaining and preserving the integrity and effectiveness of the accreditation process.

Conversations and meetings that take place during the site visit must be pertinent to the general questions and specific standards cited by the BOA in the Letter of Instruction (LOI) and should not deviate from these areas. The role of the site visitor is an objective gatherer of information, and the site visitor should stay within the boundaries of this role.

Site visitors do not provide developmental guidance, feedback, nor direction and cannot determine compliance with the EPAS. Compliance judgments and decision-making is solely within the authority and jurisdiction of the BOA.

Electronic Attestation Form: Site Visitor Ethical and Behavioral Guidelines

Site Visitor Ethical and Behavioral Guidelines

These criteria are intended to provide guidelines that bring about credibility and objectivity in accreditation processes and CSWE-Board of Accreditation (BOA) actions. Site visitors are required to affirm the *Site Visitor's Ethical and Behavioral Guidelines* to ensure duties are carried out confidentially, fairly, impartially, and responsibly by avoiding actual or apparent conflicts of interest and other improprieties. Adherence to these guidelines is essential to maintaining and preserving the integrity and effectiveness of the accreditation process.

When reviewing site visit assignments good and careful judgment must prevail after examining the assignment for potential conflicts of interest (1.2.14 Conflict of Interest Policy). Possible conflicts and other ethical issues are not always clear-cut or easy to define. As such, the site visitor is to avoid assignments that would provoke questions about objectivity and integrity.

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Site visitors are reminded that individual and collective liability is possible if CSWE-BOA, or representing entities, violate its own operating principles.

Pledge:

- I will only accept visit assignments for which I have no conflict of interest or appearance of a conflict (1.2.14 Conflict of Interest Policy).
- I will maintain confidentiality in all aspects of the site visit, including confidentiality of and all accreditation materials related to the visit. I will not disclose programmatic or institutional information, oral or written to others, that was garnered in the accreditation process or discussions relative to site visit.
- I will only consider information presented by the program in its self-study or disclosed by the program.
- I will refer program complaints from individual faculty members or students to CSWE accreditation staff.
- I will only meet with parties approved by the program's primary contact.
- I will not make offensive, insensitive, or damaging comments before, during, or after the visit concludes.
- I will not recruit faculty, students, or a job for myself.
- I will not suggest nor advocate for the use of particular content, theories, literature, or practice models.
- I will not make value judgments about resources, facilities, or faculty credentials.
- I will not criticize procedures or strategy in achieving compliance with accreditation standards
- I will not accept gifts from the program.
- I will submit site visit reports that are impartial, written in my own words, and specific to the program visited.
- I will submit the site visit report to CSWE by the required deadline.
- Upon the conclusion of the visit, I will:
 - o no longer communicate with the program unless for reimbursement purposes
 - o destroy/delete all program documents.

Reporting Ethical or Behavioral Violations

Programs that have experienced a site visitor that violated ethical or behavioral guidelines before, during, or after the site visit are encouraged to report such violations to the <u>accreditation volunteer coordinator</u>. If the volunteer coordinator is unavailable, the Associate Director of Accreditation Operations or Executive Director of Accreditation may be contacted.

Such reports will not affect the program's reaffirmation determination, and if possible, will be used to assist in the site visitor's professional growth. Each report is handled with care and on a

case-by-case basis, with the utmost respect and integrity. Depending on the situation, site visitors may be contacted to discuss a remediation plan or may be removed from site visitor service.

Site Visit Matching and Assignments

Overview

Site visits are scheduled based on the Board of Accreditation (BOA) meeting agenda for which a program will be reviewed for a reaffirmation determination. The site visit planning form, assignment, and site visit occur in the months *prior* to this BOA meeting:

• February BOA agenda for Reaffirmation Determination

- o Site Visit Planning Form Due: February 1
 - 12 months in advance of reaffirmation determination
- o Assignment Occurs: No later than April 1
 - 10 months in advance of reaffirmation determination
- o Site Visit Occurs: September 15 October 15

• June BOA agenda for Reaffirmation Determination

- o Site Visit Planning Form Due: June 1
 - 12 months in advance of reaffirmation determination
- Assignment Occurs: No later than August 1
 - 10 months in advance of reaffirmation determination
- o Site Visit Occurs: January 15 February 15

October BOA agenda for Reaffirmation Determination

- Site Visit Planning Form Due: October 1
 - 12 months in advance of reaffirmation determination
- o Assignment Occurs: No later than December 1
 - 10 months in advance of reaffirmation determination
- o Site Visit Occurs: March 15 April 15

Program Availability

Programs submit the electronic Site Visit Planning Form applicable to the program's agenda date found on the <u>reaffirmation process</u> webpage approximately one year prior to the program's reaffirmation date.

The program specifies information related to the site visit logistics, including three (3) separate dates for the site visit. Programs list the date they would like the visit to take place. For most inperson visits the day before and day after the visit are travel days for the site visitor and the primary contact must be available for assistance with logistics coordination. The dates must be discussed and cleared by the president/chancellor of the institution, and any other necessary

parties, before they are submitted. The dates should be kept open until the site visitor(s) and the date of the visit have been confirmed by CSWE. The form assists the <u>accreditation volunteer coordinator</u> in scheduling the program's visit and assigning an appropriate site visitor.

Site Visitor Availability

Site visitors also complete a site visit availability form each spring, fall, and winter to determine the dates and format(s) in which the site visitor is available. The form is emailed directly to each visitor by the <u>accreditation volunteer coordinator</u> and assists in assigning the site visitor to a program that fits their schedule.

Site visitors experiencing a change in employment that impacts one's ability to serve as a site visitor must notify the <u>accreditation volunteer coordinator</u> within 30 days. Additional information may be requested, including, but not limited to a letter of support and updated contact information,

Length of Visit

Most site visits are conducted in one day, including those that have both baccalaureate and master's programs occurring simultaneously, as many meetings can be shared by both visitors. However, an extra half day may be necessary for any visit type, depending on the complexity of the program. This can be requested when the Site Visit Planning Form is submitted or requested by the program/site visitor once the Letter of Instruction (LOI) is received by the program/site visitor. The CSWE-BOA reserves the right to extend visits, as needed, based on content of the LOI.

Visit Format

The reaffirmation site visit is to be conducted in-person for all programs, except for online-only programs, as defined in the <u>Program Change Policy</u>. Online-only programs may request an inperson visit via the Site Visit Planning Form. Expectations are consistent for both in-person and virtual visit formats.

Number of Visitors

One site visitor is assigned to each program level (i.e., baccalaureate, master's). If the program has both baccalaureate and master's programs under review at the same time and the visits are on the same day the other program level site visitor is included on the LOI notification for informational and planning purposes only. To optimize resources, both site visitors may attend relevant meetings together at the program's discretion and depending on the contents of LOI.

Matching and Assignments

CSWE staff match programs and site visitors based on availability. Site visitors and programs are asked to identify any conflicts of interest per the Conflict of Interest policy. Programs may only deny specific site visitors on the basis of a conflict of interest and are unable to deny a site visitor based on visitor experience at the program level; visitor area of expertise; institutional or programmatic religious affiliation, size, or administrative structure; program option(s) or delivery method(s); or other similar criteria. Due to ethical and administrative constraints, CSWE will not honor special requests with respect to preferences or choice related to the assignment of site visitor(s).

Notification

Once visit assignments are finalized, the <u>accreditation volunteer coordinator</u> emails the assignments to the institution's president/chancellor, the primary contact for the program, the site visitor(s), and the program's accreditation specialist.

Site Visit Planning

Initial Contact and Individual Accommodations

No less than 60 days before the visit, the program's primary contact is responsible for initiating contact with the site visitor to begin planning the visit, including travel plans and initial schedule setting. In the initial contact, the program is expected to inquire about any accommodations the visitor may need during travel or the visit (e.g., mobility, communication).

If the program's primary contact has not made contact with the visitor by this time, the visitor is asked to notify the <u>accreditation volunteer coordinator</u> for assistance.

Communication Guidelines

Advanced preparation for site visits is essential and involves close collaboration among CSWE accreditation staff, site visitors, and programs. All planning and communication regarding the site visit occur through the program's primary contact on record with CSWE.

Faculty members, students, or others should not communicate with the site visitors before arrival on campus nor until the allotted time in the site visit schedule. Constituent groups desiring to meet with site visitors should request a meeting through the program's director to arrange time on the site visit schedule. It is inappropriate for site visitors to receive anonymous documents, telephone calls, or other similar information before, during, or after the visit. Site visitors are instructed to discuss any such incidents with the program's primary contact and to refuse written or verbal information that cannot be shared openly.

Content Preparation

No less than 30 days before the visit, the program emails the program's self-study to the site visitor for their review and the program's accreditation specialist emails the Letter of Instruction (LOI) to both the visitor and program.

The program prepares for the visit by considering how it might respond to the questions raised in the letter during the site visit. The BOA does not expect the program to take formal action on the letter of instructions nor to submit a response to the site visitor before the site visit.

The site visitor reviews the self-study in its entirety prior to the visit, however only standards itemized in the LOI may be discussed onsite with the program. Information beyond the boundaries of the LOI should not be discussed, requested, nor reported. Visitors must use the required site visit report template provided with the LOI. Site visitors may not request a written program response in advance of the site visit.

Site Visit Schedule

No less than 1 week prior to the visit, the program's primary contact and site visitor jointly finalize the site visit schedule.

With the LOI as a guide, the schedule is to include:

- With whom the visitors will meet:
 - o Required:
 - President/chancellor (or designee)
 - Primary Contact
 - Program Director (if different than primary contact)
 - Field Education Director
 - Faculty
 - Students
 - o Optional:
 - Field Instructors
 - Community Advisory Board (if applicable)
 - Deans or other program administrators
 - Other stakeholders specific to the program's context
- Specific times
- Locations and/or meeting links
- Breaks
- Meals
- Workspace for the visitor

A sample site visit schedule is located on the <u>site visit information</u> webpage.

Programs with More Than One Program Option

When programs have more than one program option, it is at the discretion of the program to

include stakeholders from each program option in the reaffirmation site visit. These stakeholders can be included in a face-to-face capacity (for in-person visits) or virtually, but visitors should not be expected to visit all physical program options.

Social Events

Required social events or mandatory meals with program representatives are not acceptable. If the program decides to offer such events, it is within the visitor's purview to accept or decline the invitation. Additionally, these events should not be offered during typical work or preparation time for the visitor.

Logistics

No less than 30 days before the visit, the program's primary contact should confirm visit arrangements such as travel plans, hotel accommodations, and workspace requirements in the hotel and on campus (for in-person visits) with the visitor. The program should confirm all arrangements with the site visitor via email and the primary contact should be copied on all communications, if another program representative is coordinating logistics.

Air Travel

Programs are required to provide prepaid coach fare airline tickets to site visitors and are to consult with the site visitor about the most convenient airline carrier and flight times. Purchasing refundable tickets and/or travel insurance is highly recommended, as unforeseen circumstances such as illness, weather, etc. may occur. The program is responsible for any fees associated with the cancelled, delayed, or if applicable, rescheduled visit.

Hotel

Site visitors are to be housed in hotels, not in dormitories or other campus housing. Programs are required to coordinate hotel accommodations and arrange for the hotel to bill the program for site visitor expenses at the hotel, except for personal incidentals. Hotel accommodations are required to include a workspace. Purchasing refundable rooms is highly recommended, as unforeseen circumstances such as illness, weather, etc. may occur. The program is responsible for any fees associated with the cancelled, delayed, or if applicable, rescheduled visit.

Ground Transportation

Programs are required to provide ground transportation for the site visitor, including to and from the airport, to and from the hotel to campus, and any other required travel for the visit. Programs provide transportation in the form of a car or shuttle, taxi/rideshare, or rental car. Ground transportation may be out-of-pocket expenses for the site visitor,

however programs should make every effort to cover such costs upfront, if possible. Programs are to ensure the site visitor is comfortable with paying such expenses out-of-pocket prior to finalizing plans. Programs must inform the site visitors how reimbursement for these expenses will be managed if the visitor agrees to pay out-of-pocket.

Meals

Meals not taken at the hotel or during the visit are likely to be out-of-pocket expenses for the site visitors. Programs must inform the site visitors how reimbursement for these expenses will be managed if the visitor agrees to pay out-of-pocket.

See Payment of Expenses section below for more information

The Site Visit

During the site visit, program stakeholders and site visitors meet to discuss general questions. Beyond the general questions, site visitors ask programs to address specific questions raised by the Board of Accreditation (BOA). The program then provides information via verbal discussion to the site visitor that clarifies, corrects, and/or supplements those parts of the self-study identified in the Letter of Instruction (LOI) in which the BOA had questions.

Site Visitor(s) Arrival

During the first evening site visitors generally work alone to prepare for the visit. Program directors may meet with site visitors to extend a brief welcome, explain the itinerary, answer any questions, and outline the arrangements to escort them to the campus. Required social events or mandatory meals with the program representatives are not acceptable. If the program decides to offer such events, it is within the visitor's purview to accept or decline the invitation. Additionally, these events should not be offered during typical work or preparation time for the visitor.

Meeting with the Institutional Administrators

The BOA expects the site visit to begin with the institution's president/chancellor and any other institutional administrators at the program's discretion. The program director is to permit the visitor to meet alone with the administrators.

The purpose of this meeting is to explain the accreditation process, learn about the role and place of the program within the institution's system, answer any questions the administrator may have, and to collect any information related to the LOI. When it is not possible to meet with the institution's president/chancellor, it is acceptable that the site visitor meet with a designee as determined by the institution. CSWE trusts programs to make this decision and does not need to approve of the designee prior to the visit.

Meetings with the Social Work Program and Stakeholders

The site visitor will also meet with the program director, faculty members, the field education director, students, and any other individuals whose presence may be relevant (e.g., field instructors, librarian, community advisory boards, alumni, staff.) to address the issues raised in the LOI. The purpose of these meetings is to gather information from the program in relation to the instructions given in the LOI.

The BOA does not require or recommend dismissing classes during the site visit. It is advised that the schedule be planned to permit participation by all constituents without disrupting the academic schedule.

Exit Interview

Site visitors hold an exit interview with the primary contact and program director (if different) to convey the findings for inclusion in the site visit report. The program will determine if additional constituents (e.g., administration, faculty.) should be present. The program may ask questions, comment on the findings, or correct any inaccuracies. Site visitors may respond to questions but not make judgments of whether the program is in compliance with EPAS, as that judgment rests with the BOA.

Site visitors must remind programs that the findings, along with the program's response to site visit report, are reviewed by the BOA before making a decision about compliance. Site visitors should explicitly inform the institution and program that the BOA will notify them of its decision about program compliance and concerns.

Gifts

Site visitors are unable to accept gifts.

Questions During the Visit

Questions related to accreditations standards, the LOI, or accreditation policies may be directed to the program's accreditation specialist.

Questions regarding scheduling, transportation, accommodations, or reimbursement may be directed to the <u>accreditation volunteer coordinator</u>.

After the Site Visit

After the conclusion of the site visit, contact between the program and site visitor should cease, with the exception of any travel or reimbursement inquiries. The site visitor does not provide a

copy of the site visit report to the program and the program does not provide a copy of its response to the visitor. If the program has additional questions or comments after the visit, the program should contact the appropriate CSWE staff member.

Payment of Expenses

It is the program's responsibility to ensure all possible costs for the site visitor are covered by the program prior to the visit, inclusive of travel days and the visit day(s). Site visitors are volunteers, not contractors or employees of the program, institution, or CSWE. Therefore, site visitors are not expected to provide the program with an IRS Form W-9, personal service agreements, or similar contracts requested by the program/institution, as they are not vendors or service providers. If this is requested by the program, the site visitor is asked to contact the accreditation volunteer coordinator for support. Should a site visitor choose to enter into a contract or similar agreement with the program, CSWE is not responsible for the content or the program's adherence to the agreement. Programs are encouraged to use established vendors within their institution that can then bill the program. Another option is to provide the visitor onsite with petty cash for expenses. Failure to adhere to this policy may result in the inability to proceed in the reaffirmation process.

Within 30 days of the site visitor submitting reimbursement materials, the program will either have reimbursed the site visitor for any out-of-pocket expenses or provide an update to the visitor on an estimated payment date.

If the site visitor or program have any questions about payment of expenses for the site visit, please contact the accreditation volunteer coordinator.

Site Visit Report

Within 2 weeks of the site visit, the visitor submits the completed report template via email to the program's accreditation specialist. Report content is written in the visitor's own words and reflects objective and factual findings collected via discussion with program stakeholders. The report should not refer Board of Accreditation (BOA) readers to the program's self-study or supplemental materials provided onsite, nor should the visitor include copied/pasted narrative or excerpts from program documents. The visitor does not include materials provided by the program in the report; the program will provide this information in their program response to the site visit report.

The visitor deletes/destroys the program's documents upon confirmation of acceptance of the report by the program's accreditation specialist.

Should a site visitor need time beyond the two (2) weeks after the site visit report, the site visitor must proactively communicate with the program's accreditation specialist to inform of them of the delay and request an extension. The length of the extension is granted on a case-by-case basis, as CSWE recognizes that emergencies and unforeseen circumstances occur.

Site Visit Report Violations

Should the site visitor fail to produce a report without communicating with the program's accreditation specialist within 5 business days of the site visit report due date, or there are serious concerns with submitted report, the site visitor will be contacted to discuss a remediation plan. The CSWE executive director of accreditation and associate director of accreditation operations have the right to remove site visitors from service based on violations of site visit conduct, integrity, or performance.

Program Response to the Site Visit Report

Within 2 weeks of receiving the site visit report, the program is required to submit a Program Response to the Site Visit Report via email to the program's accreditation specialist. Any materials submitted to the site visitor during the visit should be included directly in response to that standard (not as appendices or separate attachments). If the program reviews any information with the site visitor during the visit, the program must ensure these materials are submitted in the program response to the site visit report.

The purpose of the Program Response to the Site Visit Report is to provide the program an opportunity to correct any errors of fact, clarify information that may have been incorrectly understood by the site visitor(s), and present its final complete response to the questions raised by the BOA in the Letter of Instruction (LOI). Disagreements with the site visit report should be stated clearly, and additional documentation should be provided if necessary.

The BOA uses the LOI, Site Visit Report, and Response to the Site Visit Report to make a decision on the program's reaffirmation.

Site Visit Emergencies

CSWE recognizes that scheduled visits may need to end early, be delayed, moved virtually, or cancelled due to special circumstances beyond the control of relevant parties. Examples of these special circumstances include inclement weather conditions, natural or manmade disasters, or changes to visitor's or key personnel's schedules due to extenuating circumstance; this list is not exhaustive. Purchasing refundable tickets and/or travel insurance is highly recommended, as the program is responsible for any fees associated with the cancelled, delayed, or if applicable, rescheduled visit.

In these circumstances, CSWE must be consulted to determine the best course of action in an emergency before any changes to the date or the format of the visit are enacted, unless CSWE staff are unavailable.

To inform CSWE accreditation staff of changes to a planned visit:

- 1. The party (visitor or program) must immediately notify the <u>accreditation volunteer</u> <u>coordinator</u> via email or telephone. If the volunteer coordinator is unavailable, the <u>associate director of accreditation operations</u> or <u>executive director of accreditation</u> may be contacted.
- 2. The party (visitor or program) will then notify the other party (visitor or program) via email and telephone.
- 3. The program, visitor, and CSWE accreditation staff must communicate to determine the best course of action. Due to complexity in scheduling visits, cancellations and delays will be avoided whenever possible, however the reaffirmation timetable may be impacted. Possible outcomes include but are not limited to:
 - o Change the format of the visit to be virtual on the same day
 - Delay visit
 - o Reschedule visit with same visitor for a later date
 - o Reschedule visit with an alternate visitor for the original date
 - o Reschedule visit with an alternate visitor for a later date

If CSWE are unavailable and/or the emergency occurs outside of business hours, the program/site visitor may make an informed decision and report the course of action immediately to the CSWE accreditation staff. These occurrences will be handled on an individual basis. Examples of these emergencies include inclement weather conditions, natural or manmade disasters. If necessary, site visitors may book travel and accommodations and will be reimbursed by CSWE, and the program may be invoiced upon submission of details of extenuating circumstances and submission of receipts. Coach fare and basic accommodations are expected.