

**Details Matter:**  
Conducting A Successful Onsite Visit

**2012 SACS Institute  
on Quality  
Enhancement &  
Accreditation  
July 31, 2012**



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**Session Objectives**

Through participation the audience will:

- Recognize the essential elements for planning and conducting a successful onsite visit.
- Review examples of planning documents and correspondence to support the visit.
- Become familiar with institutional support resources necessary to ensure optimum committee efforts.
- Be encouraged to ask questions and share their experiences.

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**Georgia Gwinnett College**

The 35th member of the University System of Georgia



**Opened in fall 2006. Enrollment has grown to 8400+ students in 6 years and is projected to be almost 9500 by fall 2012.**

Located In Lawrenceville, GA

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## GGC's Accreditation Status

Action	Date
GGC Opening	August 2006
Submission of Application	October 2007
Candidacy Visit	April 2008
Candidacy	June 2008
Submission of Compliance Certification	February 2009
Accreditation Committee Visit	April 2009
Initial Accreditation	June 2009 (20 months)
Reaffirmation & QEP Committee Visit	Fall 2013 – Class of 2014

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## Let's Acknowledge...

*A well-run onsite committee visit must be paired with a well-written compliance certification for a successful outcome.*




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## First Things First

- *Elements essential to planning and conducting a successful on-site visit.*
  - ✓ Identify a campus coordinator/SACS Liaison who will be the sole contact for the visit and responsible for all logistics. (Important to have them stay at the same hotel)
  - ✓ Establish good lines of communication with your SACS staff liaison and committee chair.
  - ✓ Develop a Timeline to delineate what will need to be done, by whom, and when.
  - ✓ Conduct site inspections of local hotels to determine which property you will choose.
  - ✓ Schedule a campus orientation visit for your chair.

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## Early Communication

- Early communication with the chair will assist in planning for the orientation visit and aid in establishing the site visit agenda.
- Early communication related to committee travel needs and food preferences will facilitate pre-planning.
- Providing the committee with required documents ahead of the deadline will ensure they can access all items when they begin their review.



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## Examples of Communication

- Information Outline for Committee Visit (provided by SACS for the chair to distribute)
- Introductory Letter to committee & chair w/ copy to SACS staff liaison providing basic information on your college; local maps for those driving including printed information on your community (provided by local COC).
- Committee Visit Planning Information Sheet  
Used to obtain info on committee members' Travel Schedule, Food, Beverage, Lodging & Tech Arrangements. This will aid your planning.

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## Communication is Key

- Make sure you have office phone numbers, cell numbers and personal numbers for all key personnel.
- Be sure to get preferred communication method from chair and committee members early on.
- Include all campus players involved in supporting the visit on correspondence including emails, and schedules as necessary.
- Copy your SACS staff liaison on all correspondence to chair and committee.

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### Pre-Planning Pays

- Once the date for the visit is confirmed, lock in dates with hotel for sleeping and meeting space.
- Reserve interview rooms on campus.
- Research committee members' credentials and position at institution. This is helpful in anticipating which sections of the compliance certification they may be assigned to review.
- Develop a tentative agenda with input from the committee chair.
- Order committee Name Tags.

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### First Impressions: Campus Orientation for Committee Chair

- A well executed campus orientation visit creates a good first impression and will enable the chair to communicate to the committee what they can expect.
- The orientation visit introduces key campus staff to the chair and facilitates initial dialog.
- The Orientation Visit allows the chair to become familiar with the hotel and campus support resources such as the work room.

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### Prepare Your Campus Constituents

- Host Campus Staff Development Sessions for specific college units such as Staff and Student Affairs to introduce them to the process; Support Documentation and its location; committee members' background, how their unit may be impacted; and what to expect.
- Customize each session to address the specific CR/CS that reflects the unit's functions/contributions. These types of sessions serve to keep everyone in the loop, provide information and generate enthusiasm.
- Make the events (Rally) informative and fun!

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## Identify Support Services

- *Institutional support/resources are necessary to ensure optimum committee efforts.*
  - ✓ Early on it is advisable to meet with administrators of key campus support services to outline what will be needed from their unit.
  - ✓ This may include: clerical support; facilities; dining services; technology; campus security; student affairs; foundation; and business services.
  - ✓ Any areas that might not have the resources to support your needs should be addressed through the appropriate VP or administrator.

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## Campus Support Is Crucial

- **Technology:**
  - ✓ Support throughout the process including the visit will ensure a smooth and successful visit.
  - ✓ Flash drives for each committee member are a must.
  - ✓ 24/7 tech support while at hotel & on campus is necessary. **Get your tech a room!**
  - ✓ Laptops for each committee member and a computer work station w/ printer at the hotel and in campus work room provide for optimum committee productivity.
  - ✓ Projection equipment at the hotel and in campus work room is usually needed.

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## Campus Support Is Fundamental

- **Motor Pool/Transportation:**
  - ✓ Multiple college/rental vehicles are preferable to one large passenger van. Too hard to get in and out due to height. Also, team members may need to be transported at different times to multiple locations.
  - ✓ Best to have designated drivers who do not have other assignments since schedules frequently change.
- **Campus Security:**
  - ✓ Secure work area w/ keys provided to chair/SACS staff member
  - ✓ Reserved parking

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## Campus Support Is Essential

- **Facilities:**

- ✓ Clean, welcoming environment w/ campus signage
- ✓ Comfortable work space w/ appropriate tables/chairs
- ✓ Classrooms and conference rooms for interview venues

- **Dining Services:**

- ✓ Catering for on-campus meals & breaks

- **Student Affairs:**

- ✓ Student escorts
- ✓ Students for interviews
- ✓ Campus goodies for committee members

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## Campus Support Is Vital

- **Clerical:**

- ✓ Paper shredder at hotel and in campus work room.
- ✓ Office supplies for hotel work room and campus work room.
- ✓ Access to printer and copy machines.
- ✓ Clerical support if requested.

- **Business Services/Foundation:**

- ✓ Timely processing of travel reimbursements and SACS expenses.
- ✓ Financial support for food & food related expenses.

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## Food & Beverage is #1

- *A well fed committee is a happy committee!*

- ✓ Ask the chair for suggestions/approval when selecting restaurant cuisine.
- ✓ Provide snacks and fruit in welcome bags.
- ✓ Have healthy snacks as well as chocolates in both locations.
- ✓ Always have an assortment of soft drinks & bottled water in the hotel and campus work rooms.
- ✓ Be sure to consider dietary restrictions when planning meals and selecting restaurants.

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## Typical Onsite Committees

Type	Number	Make-up
Candidacy Committee	5-7	Chair; Faculty; Educational Programs; Library; Student Support Services; Institutional Effectiveness; Finance; SACS Staff Liaison
Initial Accreditation	10	Chair; Faculty Qualifications & Educational Programs (3); Organization & Administration; Finance; Institutional Effectiveness; Library; Student Support Services; SACS Staff Liaison
Reaffirmation Committee	7 (Min)	Chair; Faculty; Educational Programs; Student/Learning Support Services; Institutional Effectiveness; Finance; QEP Evaluator; SACS Staff Liaison
Substantive Change	As Needed	As needed

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## Sample Budget

Activity	Estimated Cost
Committee Chair Orientation Visit	1200.00
Committee Travel (8-10 travelers)	6000.00
Lodging (Committee & support staff)	4200.00
Food	2500.00
Local Transportation (2 rental vehicles)	500.00
Supplies/Materials/Printing	300.00
SACS Staff Advisory Assessment	500.00
SACS Incidental costs	250.00
Misc. (Gas, tips, etc.)	250.00
<b>Estimated Total</b>	<b>\$16,000.00</b>




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## Always....

- Make sure another key staff person knows all the details as well – “Just in case you get hit by a bus.” ☺
- Immediately alert those who are affected when the schedule changes.
- Be sure all committee members have your personal contact information in case of emergency; especially if you are not staying at the hotel.

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## BE FLEXIBLE

- Things will never go 100% as planned.
- Be prepared to provide supplementary materials and documents requested by the committee in a timely manner.
- Keep all college staff informed of schedule changes as they occur.
- Always consult with the chair and/or SACS staff liaison if a committee member makes a request that seems unusual or unplanned.

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### Things To Remember

- The college SACS liaison's primary duty during the visit is to be sure the chair and committee members have everything they need.
- Don't schedule interviews back to back to allow for transition time.
- Have extra support documents, catalogues, handbooks, campus directories, etc. for reference as needed.
- Never enter the committee work areas unless asked or authorized.
- When in doubt, ask the chair or SACS staff liaison - Don't assume.

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### Preparing For The Exit Interview

- Consult with the chair as to the time and desired configuration of the room.
- Have your campus president/CEO designate and communicate ahead of time who will attend.
- Keep the logistics of this important meeting simple as committee members typically depart for home immediately following the exit interview.
- Provide light refreshments for all guests.

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## Celebrate Your Success

- After the visit, take a day off!
- Meet with key staff to evaluate the visit.
- Assess and note what went well, changes for next time, and never do again!
- Organize & file all visit documents and planning materials – You will need to reference these for future visits, i.e. sub-change, reaffirmation, etc.

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## Resources

- Your SACS VP/Staff Liaison & other SACS Staff members
- SACS Web site – [www.sacscoc.org](http://www.sacscoc.org)
- Institutional Resources:
  - *Handbook for Institutions Seeking Reaffirmation*
  - Templates for Compliance Certification
  - *Resource for Manual for the Principles...*
  - *Handbook for Review Committees*
  - *Commission Policies*

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## Resources

- Annual Meeting/Summer Institute sessions
- Accreditation in Southern Higher Education Listserv  
[ACCSHE@LISTSERV.UHD.EDU](mailto:ACCSHE@LISTSERV.UHD.EDU)
- Colleagues who have served as reviewers
- Fellow SACS Liaisons at like institutions

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## Presenter Contact Information

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