



NAACLS Site Visit Packet Task Force Charges and Actions

Task force members: Candi Grayson (chair), Hassan Aziz, Rochelle Helminski, Carol Rentas, Renee Wilkins, Stefanie Troxell, (staff liaison)

The Site Visit Packet Task Force was charged with reviewing and revising the Site Visit Packet to ensure it reflects up-to-date and relevant information. The task force was asked to consider the following charges from CEO Marisa James:

A. Identify and define the intended audience(s) for the packet. The task force may choose to create separate components of the packet to meet both parties' needs.

Task Force Actions:

1. The task force identified that the Volunteer Manual is to be for our volunteers. Program directors should reference the Guide to Accreditation for guidance. The former "Dear Colleague" letter near the beginning of the manual has been changed to a "Dear Volunteer" letter and requests that program directors visit the Guide to Accreditation.

B. Evaluate the current contents of the packet for relevance and usefulness. Determine which materials should be retained, revised, removed, or replaced.

Task Force Actions:

MATERIALS RETAINED

1. Read_First_Contents
2. IMPORTANT TELEPHONE NUMBERS FOR NAACLS TRAVELERS
3. Site Visit Expense Report Template
4. Site Visit Report Form
5. Volunteer Manual

MATERIALS REVISED

1. The Volunteer Manual took most of the task force's time to reorganize and revise. See charge **F** below for more details.

MATERIALS REMOVED

1. Article 1 - Curriculum Review under 2012 Standards (*this was deemed outdated*)

2. Article 2 - Site Visit Time Management *(the task force felt that this is now addressed in great detail within the Volunteer Manual.)*
3. ChubbInsuranceCard *(however, a hyperlink has been included within the manual.)*
4. Guidelines to Completing SSR and SVR *(these guidelines have been added to the Volunteer Manual.)*

MATERIALS REPLACED

1. None

C. To guide the language and ensure alignment with the 2024 Standards, emphasize the importance of avoiding personal interpretations or opinions when citing concerns.

Task Force Actions:

1. Statements added to the Self-Study Review section such as:
 - a. “The completed Self-Study Report Review..... must represent a concise, comprehensive, **objective**....”
 - b. in the evaluation portion “Were all statements or comments specific, **objective and without opinions or recommendations?**”
2. Statements added to the Site Visit Section such as:
 - a. “Should maintain.....**objectivity**....during the visit”
 - b. “Site visitors should be professional, **objective** and friendly.”
 - c. in the evaluation portion “Were all statements or comments specific, **objective and without opinions or recommendations?**”
3. The term “**fact-finding**” was also added in two areas.
4. In the Appendix chart “Examples of Language for the Self-Study Review and Site Visit Report” in the “Comments” line were examples of language not to use. “**I feel**” was noted as not appropriate and that reviews are **factual based**. Also addressed “**best wishes**”.
5. Encourage use/reference to the Standard Compliance Guide.

D. Review components of the packet for virtual and hybrid site visit relevance, including, but not limited to, considerations such as Zoom etiquette, ensuring privacy during the interview process, managing interview no-shows, and time management.

Task Force Actions:

1. Edited sections to include considerations for time management.

2. Created a list of “Video Conference Etiquette”.
3. Created a section titled “Managing Interview No-shows” explaining how site visitors should handle cases such as this.

E. Ensure alignment with current NAACLS internal processes, including any updates to timelines, forms, or review procedures.

Task Force Actions:

1. The task force took time to ensure that:
 - a. the timelines and tables within the Volunteer Manual were updated.
 - b. the information within the Volunteer Manual aligns with both the Self-Study Review and Site Visit Report.
 - c. review procedures within the Volunteer Manual were accurate.
 - d. Instructions for the new forms that auto-populate were added.
 - e. Encourage use of Standard Compliance Guide.

F. Review and update information in the [Volunteer Manual](#) that relates to the site visit.

Task Force Actions:

UPDATED INFORMATION

1. Extracted “Expectations of the NAACLS Volunteer” from the SS and SV sections and added them to the beginning of the document.
2. Updated the volunteer expectations, qualifications and responsibilities based off the board approved changes.
3. Organized mentor section.
4. Aligned SS and SV sections content to mirror one another, ensuring title and content order consistency.
5. Updated time management tables.
6. Added more information to the Welcome Conference and Exit Interview sections per the request of past site visitors. Two specific items include “Set a Positive Tone from the Start” and “Serve as a NAACLS Ambassador”.
7. Sample Questions for Site Visits (excluding DCLS):
 - a. Consolidated university-based program and hospital-based program questions into one list.
 - b. Additional questions were added.
 - c. Sample questions were created for the Clinical Liaisons/Preceptors position.

G. Develop additional volunteer resources, such as a Frequently Asked Questions (FAQ) section and guidance on common challenges to help avoid speedbumps.

Task Force Actions:

1. An FAQ section was created for questions regarding site visit expenses.
2. Information was added throughout the Volunteer Manual for all subject areas that required updating to help guide volunteer through both processes.
3. The task force felt as though adding more ancillary resources may conflict with NAACLS workshops and wanted to avoid providing examples.

Outside of the above changes, the task force also made edits to the *Expectations of the NAACLS Volunteer* section within the Volunteer Manual. Those edits are indicated in red font within the Volunteer Manual Google Doc.