

## APPENDIX B: PREPARING FOR THE SITE VISIT

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As part of the approval process, PELSB conducts a site visit to verify the provider's compliance with applicable unit standards as documented in the self-study. Site visits can be held "on site" or "virtually."

The site visit is conducted by a Review Team and facilitated by the PELSB Team Chair. Sometimes, additional PELSB staff members and board members also attend. More information about the Review Team and the PELSB Team Chair is included in Section 2.5.

Providers seeking initial approval should contact PELSB staff with a notice of intent to apply for unit approval.

For providers seeking continuing approval, PELSB staff will reach out to schedule a site visit approximately 15 - 24 months in advance of the unit site visit.

Two significant steps of preparing for a unit site visit are writing the self-study and following up on deficiencies with an addendum to the self-study.

At least one month prior to the site visit, the provider must submit an interview schedule to board staff. Within this schedule, it should list names of individuals or groups of individuals (e.g. assessment committee). Generally, for stakeholder groups, aim to have at least ten interviewees and seek to have a representative sample with individuals with experiences in programs across unit. Even though some individuals interviewed may have multiple roles (e.g. alumni, cooperating teachers, advisory group), keep interview groups separate. This may mean that some individuals participate in more than one interview.

The remainder of this appendix addresses common expectations for hosting a site visit, including expenses, transportation, meals and refreshments, and hotel arrangements.

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## SAMPLE SCHEDULE

While the traditional site visit schedule is Sunday night through midday Tuesday, the Board has done visits during weekdays and is open to other schedules. If you are interested in exploring what another schedule could look like, please discuss with a Teacher Education Specialist as there is also the possibility of splitting the visits into two to three shorter days.

*Sunday:* With the traditional visit schedule, reviewers meet with stakeholders who are not available during the workday on Monday, including school partners, cooperating teachers, alumni, and sometimes advisory groups.

*Monday:* This is normally a full day (8 AM – 5 PM) of interviews with teacher educators, advisors, licensing officers, assessment coordinators, clinical experience coordinators, administration, financial officers, candidates, and student teachers.

*Tuesday:* The team may request additional interviews, if needed. Then the Team Chair shares the oral report.

# VISIT EXPECTATIONS

## Expenses

PELSB assumes responsibility for most expenses of the Review Team. PELSB pays for all hotel costs. Review Team members are reimbursed in accordance with state rules for meal and mileage costs.<sup>1</sup>

## Transportation

The Review Team will travel back and forth from the hotel to the unit. The provider may choose to shuttle the team to and from the hotel or purchase parking permits for the team. If a provider has more than one site, it is recommended that someone transport team members to other sites.

## Lodging

The PELSB Team Chair will seek a recommendation for hotel(s) that can accommodate the Review Team. Hotel criteria include:

- Suitable workroom that can be reserved with internet service available,
- Close walk or drive to the preparation provider site, and
- Offers breakfast on site (recommended).

The PELSB Team Chair should be informed of possible hotels six to nine months prior to the visit so that reservations can be made. Again, the expenses at the hotel will be billed to PELSB and are not the responsibility of the provider.

[1] Minn. R. 8705.1100, subpart 1(F).

## Meals/Refreshments

Sunday, dinner	If the provider chooses to host a Sunday night reception or dinner, the provider is expected to cover the costs.
Monday, breakfast	If the hotel does not provide a breakfast, then having the unit provide continental breakfast choices in the workroom would be most efficient and appreciated.
Monday, lunch	Typically, Monday has a working lunch. The Review Team may purchase lunch and be reimbursed for those costs. However, for time savings, it is recommended that the unit leader arrange that lunch be brought to the work room, which requires the unit to cover the cost of lunch.
Monday, dinner	Please provide recommendations of nearby casual dining restaurant options.
Tuesday, breakfast	If the hotel does not provide a breakfast, then having the unit provide continental breakfast choices in the workroom would be most efficient and appreciated.
Refreshments and snacks	As Review Team members provide a professional service, they appreciate having soft drinks, coffee, and snacks in the workrooms – both at the hotel and on-site. The state has no ability to provide Review Team members with refreshments (other than meal reimbursement allocations).

## Required Support for the Review Team

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Make plans to provide the following:

- Access to candidate records,
- Copying and computer services;
- On-site workroom where team can discuss privately and which is not used for interviews or other meetings during the visit;
- Support connecting to WiFi (sometimes a challenge for state computers);
- Staff person to assist with scheduling follow-up interviews, if necessary (someone to contact if the unit leader is in interviews);
- Attendance list for each interview session; and
- Escorts between interview sessions if review members will be going to different buildings.

Consider providing a “Welcome Folder” available to Review Team members upon arrival at the hotel on Sunday afternoon with the following:

- Contact information for key individuals including:
  - Unit leader contact information/phone number,
  - Visit coordinator contact information, and
  - Tech support person.
- Suggestions of a restaurant for a working dinner on Monday evening;
- A printed list of all exhibits, coded to PELSB standards, used for a sign off by reviews;
- Final interview schedule;
- Any updates that team members should know; and
- Building maps and if applicable, campus maps.

## Virtual Visit Expectations

2020-2021 visits were conducted virtually and 2021-2022 site visits will be conducted virtually in response to the COVID-19 pandemic. Below are some general expectations for hosting virtual site visits.

- For virtual visits, the provider must be able to host separate “virtual meeting rooms” simultaneously for the separate interviews. PELSB strongly encourages the provider practice using multiple rooms in advance of the visit and having IT support readily available.
- PELSB recommends that the provider have separate links for each interview to avoid having different stakeholder groups overlap. Please include the link for each meeting on the schedule that will be shared with PELSB Review Team members.
  - Share the final schedule with all links and login information to the team chair and team members at least one week prior to the visit.
  - To avoid confusion or mix-ups in terms of who is logging into what meeting, only provide the login details specific to the participants that will be attending each meeting and send a master list to the team chair.
- It is important that participants are comfortable using the screen share function so that candidate records can be shared virtually.
- The provider must maintain attendance lists for each stakeholder group.
- The provider should provide guidance to participants on virtual meeting etiquette, highlighting the following functions to avoid disruptions and interruptions:
  - Sound quality: Encourage all participants to mute upon entry and remind everyone to mute when they are not speaking. Additionally it is recommended to use earphones.
  - Chat: During interviews, meeting participants should only use the chat if prompted by a reviewer.
  - Hand raising: If the platform being used enables user to “raise their hand” or otherwise indicate their desire to speak, please encourage participants to make use of this.
  - Name: In larger meetings, it is helpful if participants can clearly label their name and role if the platform allows.
- PELSB will not record any of the meetings nor does PELSB allow the recording of the meetings by the preparation provider and/or the meeting participants.
- Plan for a backup plan for a power/internet connection failure.
  - If a review team is not able to complete its review based on technological problems, PELSB may reschedule a visit.

The purposes of a virtual site visit are the same as for an in-person site visit:

- To triangulate the narrative and evidence provided in the self-study;
- Clarify information and verify that standards are met