

SITE VISIT TEAM ROLES AND RESPONSIBILITIES

Table of Contents

Introduction.....	3
Site Visit Team Expectations.....	4
Environment	4
Representative of CAHME's Values	4
Steward of CAHME's Mission and Standards	4
Professional Preparation, Conduct, and Accountability	5
Guardian of the Peer Review Process.....	5
Ambassador for CAHME's Culture of Continuous Quality Improvement.....	5
Training, Participation, and Professional Development	6
Meeting Schedule Responsibilities.....	6
Role Specific Expectations: Chair.....	7
Overview	7
Team Facilitator and Operational Leader	7
Logistics	7
Builds team consensus.....	8
Site Visit Report Responsibilities	8
Role Specific Expectations: Coordinator and Second Coordinator.....	9
Overview	9
Team Facilitator	9
Before the Site Visit	9
During the Site Visit.....	9
After the Site Visit.....	10
Role Specific Expectations: Team Member	11
Overview	11
Roles and Responsibilities.....	11
Role Specific Expectations: Observer	12
Roles and Responsibilities.....	12
Supporting Observer Development and Engagement.....	13
Role Specific Expectations: CAHME Staff Quality Assurance Observer	15
Overview	15
Roles and Responsibilities.....	15
Events Prior to the Site Visit	17
Fellow Badge Program.....	18

Introduction

CAHME Site Visit Teams are composed of trained volunteers and staff who work collaboratively to conduct fair, rigorous, and evidence-based accreditation reviews. Each role carries distinct responsibilities that contribute to the effectiveness, integrity, and consistency of the accreditation process.

- Whether serving as a Chair, Coordinator, Team Member, Observer, or Quality Assurance Observer, all participants share a commitment to professionalism, objectivity, confidentiality, continuous improvement, and the advancement of healthcare management education.
- These role descriptions are intended to provide clarity regarding expectations, responsibilities, and contributions throughout the accreditation review process.
- While some responsibilities vary by role, all participants are expected to actively support the mission of CAHME and contribute to a constructive, collegial, and evidence-based peer review environment.

Site Visit Team Expectations

To ensure the quality, consistency, and credibility of the accreditation process, all Site Visit Team participants are required to remain current on all required CAHME training, orientation, calibration, and continuing education activities. Individuals who do not maintain required training and qualification requirements may be ineligible to participate in site visit activities until those requirements are completed.

Environment

- Each member of the team will foster a supportive, inclusive, and collegial team environment where all members feel welcomed, respected, and valued.
- The team members will encourage open dialogue, actively seek diverse perspectives, ensure every team member has an opportunity to contribute, and cultivate a culture of trust and collaboration that enables the team to effectively leverage its collective expertise throughout the accreditation review process.

Representative of CAHME's Values

- Demonstrates professionalism, responsiveness, respect, and accountability in all interactions.
- Builds confidence in the accreditation process through effective communication and organization.
- Represents CAHME positively when working with programs, volunteers, and stakeholders.

Steward of CAHME's Mission and Standards

- Advance CAHME's mission by supporting excellence in healthcare management education through a high-quality accreditation process.
- Promote the consistent application of CAHME accreditation standards, policies, and procedures. Ensure accreditation reviews remain aligned with the intent, spirit, and expectations of the CAHME standards.
- Apply standards objectively, consistently, and based on evidence throughout the peer review process.
- Support a fair, rigorous, and evidence-based accreditation review process.
- Protect the integrity, credibility, and continuous improvement of CAHME accreditation.

Professional Preparation, Conduct, and Accountability

- Site Visit Team members are expected to demonstrate professionalism in every aspect of the accreditation process by being prepared, responsive, respectful, communicative, accountable, and committed to high-quality peer review.
- Be prepared by thoroughly reviewing assigned materials and completing all responsibilities by established deadlines.
- Evaluate evidence objectively in accordance with the CAHME Standards, basing findings on documented evidence rather than personal opinion.
- Communicate professionally by asking evidence-based questions, documenting findings and responses accurately using CAHME tools, and responding promptly to team members, program representatives, and CAHME staff.
- Maintain professionalism and integrity by demonstrating respect, confidentiality, ethical conduct, and accountability throughout the accreditation process.
- Represent CAHME positively by fostering trust, collaboration, and confidence in the accreditation process through professional interactions with programs, volunteers, and stakeholders.

Guardian of the Peer Review Process

- Protects the integrity, objectivity, and credibility of the accreditation review process.
- Maintains confidentiality, professionalism, and ethical conduct throughout all phases of the review.
- Supports a fair, consistent, organized, and evidence-based peer review process.
- Ensures accreditation policies, procedures, and review protocols are followed consistently.
- Promotes confidence and trust in the CAHME accreditation process through impartial and professional stewardship.

Ambassador for CAHME's Culture of Continuous Quality Improvement

- All Site Visit Team members share responsibility for advancing CAHME's culture of continuous quality improvement by contributing to the ongoing enhancement of the accreditation process.
- Provide constructive feedback on accreditation processes, training, tools, resources, and procedures.
- Identify opportunities to improve the consistency, effectiveness, efficiency, and quality of accreditation reviews.

- Collaborate with CAHME staff and volunteer leaders to strengthen the accreditation experience for programs and site visitors.
- Support a review process that is constructive, collaborative, evidence-based, and improvement-focused.
- Engage in ongoing learning and continuous professional development to strengthen their effectiveness as peer reviewers.
- Through these efforts, Site Visit Team members help ensure that CAHME's accreditation process remains relevant, credible, effective, and responsive to the evolving needs of healthcare management education.
- Supports CAHME's quality assurance processes by ensuring consistency, accuracy, and continuous improvement in accreditation policies, procedures, documentation, communication, and review operations.

Training, Participation, and Professional Development

- Site Visit Team members are expected to maintain their qualifications and actively participate in CAHME training, accreditation activities, and professional development to support consistent, high-quality accreditation reviews.
- Complete all required training and professional development activities by established deadlines.
- Respond promptly to training invitations, RSVP requests, site visit scheduling requests, and other CAHME communications.
- Attend and actively participate in required training, calibration sessions, meetings, webinars, and other educational activities.
- Maintain the qualifications and competencies required to serve as a Site Visit Team member.
- Complete all required post-site visit activities, including timely participation in post-visit reviews, debriefings, evaluations, and quality improvement activities.
- Support the development of fellow volunteers by mentoring, coaching, and sharing best practices when appropriate.

Meeting Schedule Responsibilities

Develop a schedule for SVT meetings that include:

- **SVT Introductory Call:** Introductions, set the tone for collaborative, respectful, inclusive, open-minded, and effective site visit process
- **SVT and Program Introductory Meeting:** Chair determines who attends – typically the chair, coordinator, and observer. This is a meeting to acquaint the team with the program to share the CAHME philosophy of peer review, collaboration, and

- **Self-Study Review Meetings:**
 - 3-4 meetings to review each standard
 - Discuss each member's independent review of the self study
 - Make specific notes on missing evidence and additional materials needed using the CAHME Decision Support Tool (required for all site visits).
- **LMS validation meeting**
- **Finalize Site Visit Logistics Conference Call:** SVT Chair, Coordinator, and Observer meet with the program to answer questions, clarify logistics, and add any updates to the program (review schedule, hotel details, and transportation logistics)

Role Specific Expectations:

Chair

Overview

The Site Visit Chair serves as the leader of the Site Visit Team and is accountable for the overall effectiveness, quality, and integrity of the accreditation review. By facilitating collaboration, ensuring objective evaluation of evidence, promoting consistent application of CAHME standards, and guiding the team toward consensus-based findings, the Chair helps ensure that the review process is rigorous, constructive, and valuable to both CAHME and the program under review.

Team Facilitator and Operational Leader

- Serves as the operational leader and project manager for the site visit process.
- Coordinates communication among the program, Site Visit Team, and CAHME staff.
- Anticipates and resolves logistical challenges before they become barriers.
- Supports collaboration among team members.
- Creates conditions that allow the team to focus on evidence review rather than administrative details.
- Ensures team members understand the program's context, strengths, and areas requiring clarification.
- Holds each team member accountable for reviewing the self-study in detail, providing comments on their assessment of the program's ability to meet the criteria
- Ensures the team does not go beyond the scope of the standards

Logistics

- Conducts pre-visit conference calls.
- Identifies preliminary questions and areas for further exploration.
- Reviews and finalizes the visit schedule.
- Ensures appropriate interviews and evidence sessions are planned.

- Confirms logistics and team readiness.

Builds team consensus

- Leads daily team deliberations.
- Facilitates discussion of strengths, opportunities for improvement, and concerns.
- Ensures findings are aligned with CAHME standards.

Site Visit Report Responsibilities

- **Site Visit Findings Submission:**
 - Chair is responsible for ensuring the report is written and complete and submitted to CAHME no later than 2 Weeks Post-Visit. The chair must lead the writing of the site visit report and assigns additional team members to participate
- **CAHME Administrative Review:** The chair may be asked to participate in additional clarification and revising of the findings after the administrative review to ensure the findings align with the Standards and the program feedback provided is clear and actionable.
- **Program Rebuttal:** Review the program's response to the draft report and determine what changes, if any, need to be made.
- **Accreditation Council Presentation of Findings:**
 - Review the final site visit report for accuracy before it is presented to the Accreditation Council
 - The chair is required to present the recommendations of the site visit to the Accreditation Council virtually if not a member of the Council.
- In the case of an appeal, provide clarification if asked
- **~3 Month Post Accreditation Decision Meeting with Program:** The chair participates in reviewing the final findings with the program, clarifying any questions about "actions to met" to facilitate clear understanding of expectation for the progress report.

Role Specific Expectations: Coordinator and Second Coordinator

Overview

The **CAHME Site Visit Coordinator** serves as the operational leader and project manager for the site visit process. While the Site Visit Chair is responsible for leading the peer review and evaluation activities, the coordinator ensures that the visit is well-organized, efficient, and fully supported so the team can focus on assessing the program.

Second Coordinator

A Second Site Visit Coordinator may be assigned when additional leadership and coordination support will enhance the effectiveness of the review. Common circumstances include initial accreditation reviews, multi-program evaluations, or reviews involving substantial documentation and complexity. The Second Coordinator serves as a collaborative partner to the Lead Coordinator, helping to ensure a comprehensive, efficient, and high-quality accreditation review.

Team Facilitator

- Communicate with the chair and the program as needed to ensure everyone is kept informed and sharing of information is fluid and effective
- Anticipates and resolves logistical challenges before they become barriers.
- Supports collaboration among team members.
- Help create an environment where the team can focus on evidence review rather than administrative details.
- Support the training of the observer along with the site visit chair

Before the Site Visit

- Serves as the primary liaison between the program, site visit team, and CAHME staff.
- Coordinates scheduling, travel, lodging, and logistical arrangements.
- Assists with development and refinement of the site visit agenda.
- Ensures all required materials, exhibits, and supporting documents are available to the team.
- Monitors timelines and communicates key deadlines to all parties.
- Supports the Chair in preparing the team for the visit.

During the Site Visit

- Oversees day-to-day logistics and scheduling.
- Serves as a resource for the team if issues arise.
- Coordinates interview transitions and schedule adjustments.

- Ensures requested evidence and materials are obtained efficiently.
- Supports the Chair in maintaining an organized and productive review process.
- Helps create a professional, welcoming environment for both the site visit team and program participants.

After the Site Visit

- Assists with collection and organization of team notes and supporting materials.
- Supports completion and submission of the Site Visit Report.
- Coordinates follow-up communications as needed.
- Ensures documentation is complete and submitted according to CAHME timelines.

Role Specific Expectations: Team Member

Overview

The **CAHME Site Visit Team Member** serves as an independent peer reviewer responsible for evaluating evidence, contributing expertise, and helping the team reach fair, objective, and evidence-based conclusions regarding a program's compliance with CAHME standards.

While the Chair leads the review and the Coordinator supports the process, the Team Member serves as an active contributor whose professional judgment, subject matter expertise, and engagement are essential to the quality and credibility of the accreditation review.

Roles and Responsibilities

Before the Site Visit

- Review the self-study in detail and all associated evidence
- Identify questions, areas for clarification, and evidence to verify.
- Participate actively in pre-visit meetings and planning discussions.

During the Site Visit

- Participate in interviews, meetings, and evidence review activities.
- Ask objective, evidence-based questions and evaluate program processes and outcomes.
- Contribute observations and expertise during team deliberations.
- Support a collaborative, respectful, and professional review environment.
- Maintain confidentiality and adhere to CAHME policies and expectations.

After the Site Visit

- Submit assigned findings and report contributions within established timelines.
- Ensure observations and conclusions are supported by evidence.
- Assist with report review and refinement as requested.
- Participate in post-visit feedback and continuous improvement activities.

Role Specific Expectations: Observer

Observers actively participate in all phases of the accreditation review and contribute to evidence review, interviews, and team deliberations under the guidance of the Site Visit Chair. The Observer role is developmental in nature and is intended to prepare individuals for future service as a CAHME Site Visitor. Observers contribute to the team's work but do not independently lead interviews, direct team deliberations, or determine final accreditation findings.

Roles and Responsibilities

Before the Site Visit

- Meet with the Site Visit Chair to clarify expectations, assigned review areas, and learning objectives.
- Complete all required CAHME Observer orientation and training.
- Review the assigned Self-Study, exhibits, and supporting documentation before the site visit.
- Become familiar with the applicable CAHME Standards, tools, policies, and site visit procedures.
- Prepare evidence-based questions related to assigned standards.
- Participate in pre-site visit team meetings and planning discussions.
- Complete assigned review activities and submit requested materials by established deadlines.

During the Site Visit

- Actively participate as a member of the Site Visit Team throughout all meetings and review activities.
- Evaluate assigned evidence using the CAHME Standards and other appropriate tools.
- Ask evidence-based questions during interviews, as appropriate and coordinated with the Site Visit Chair.
- Contribute observations, analysis, and recommendations during team deliberations.
- Document observations and evidence using CAHME-approved templates and tools.
- Observe effective interviewing techniques, team decision-making, and consensus-building practices.
- Maintain professionalism, confidentiality, objectivity, and ethical conduct throughout the visit.
- Seek feedback and guidance from the Site Visit Chair and experienced Site Visitors to strengthen accreditation knowledge and review skills.

After the Site Visit

- Complete assigned documentation and follow-up responsibilities by established deadlines.
- Participate in the Site Visit Team debrief and post-visit quality review.
- Reflect on lessons learned and identify areas for continued professional development.
- Meet with the Site Visit Chair or mentor to review performance, discuss strengths, and identify opportunities for growth.
- Incorporate feedback into future accreditation activities to build readiness for service as a Site Visitor.
- Complete any required post-visit evaluations or Observer feedback requested by CAHME.

Supporting Observer Development and Engagement

The Coordinator serves as the Observer's primary mentor, helping them understand CAHME accreditation processes while encouraging active participation and professional growth throughout the site visit.

Before the Site Visit

- Introduce the Observer to the Site Visit Team, review expectations, and discuss learning objectives.
- Ensure the Observer has access to required materials, training resources, schedules, and CAHME tools.
- Explain the site visit process, team roles, assignments, and opportunities for participation.

During the Site Visit

- Provide guidance on accreditation procedures, evidence review, documentation, and team operations.
- Encourage appropriate participation in interviews, evidence review, and team discussions.
- Answer questions, provide real-time coaching, and help the Observer understand the rationale behind team decisions and logistical processes.
- Foster the Observer's confidence, professional judgment, and understanding of CAHME's peer review process.

After the Site Visit

- Chair and Coordinator: Conduct a debrief to discuss lessons learned, strengths, and opportunities for continued development.

- Provide constructive feedback regarding the Observer's participation and readiness for future Site Visit Team roles.
- Encourage continued engagement in CAHME training and volunteer development opportunities.

Role Specific Expectations: CAHME Staff Quality Assurance Observer

Overview

In some site visits CAHME will include a staff member. The CAHME Staff Member - Quality Assurance Observer participates in the site visit to observe the accreditation process, gather feedback, assess consistency in the application of standards and procedures, and identify opportunities to strengthen the effectiveness of CAHME's accreditation system. The Quality Assurance Observer supports continuous improvement efforts while remaining independent of the team's evaluation and findings.

Roles and Responsibilities

Before the Site Visit: Prepare for Observation

- Review relevant accreditation standards, policies, procedures, and site visit expectations.
- Coordinate with the Site Visit Chair and Coordinator regarding site visit logistics.
- Identify quality assurance goals, feedback areas, and process measures to be assessed during the visit.
- Participate in all pre-site visit meetings

During the Site Visit: Quality Assurance and Continuous Improvement

- Observe and evaluate the accreditation review process to support the quality, consistency, and continuous improvement of CAHME accreditation by:
- Observing team interactions, interviews, evidence review, deliberations, and overall site visit operations.
- Assessing the consistent application of CAHME standards, policies, procedures, and review protocols.
- Monitoring the effectiveness of accreditation processes, tools, resources, and team practices.
- Gathering feedback and identifying strengths, challenges, emerging trends, and opportunities for improvement.
- Documenting observations and recommendations to inform future training, guidance, policies, procedures, and quality assurance activities.

After the Site Visit: Contribute to Quality Assurance Activities

- Summarize observations and feedback gathered during the visit.

- Identify recommendations to improve training, guidance, tools, processes, or accreditation operations.
- Participate in debriefing and continuous improvement discussions with CAHME staff and leadership.
- Contribute to ongoing evaluation of accreditation effectiveness and consistency.

Events Prior to the Site Visit

Site Visit Team Preparation Timeline

TIMING PRIOR TO SITE VISIT	CHAIR	TEAM MEMBER	COORDINATOR	COORDINATOR IN TRAINING	PROGRAM DIRECTOR	EVENT / PURPOSE
12–10 WEEKS PRIOR	✓	✓	✓	✓		Site Visit Team Kickoff Meeting: Introductions; establish the team's review approach and timeline; assign responsibilities; and plan the individual meetings with the program and internal team meetings for reviewing the self-study.
10 WEEKS PRIOR	✓	✓	✓	✓	✓	Initial Program Logistics Meeting: Meet with the program director to review site visit logistics, discuss the review process, and answer questions.
10–8 WEEKS PRIOR	✓	✓	✓	✓		Self-Study Review Meeting #1: Review the program's self-study, discuss preliminary observations, identify questions, and determine areas requiring additional review.
8–6 WEEKS PRIOR	✓	✓	✓	✓		Self-Study Review Meeting #2: Continue reviewing the self-study, assess available evidence, discuss findings, and identify any gaps or follow-up questions.
6–4 WEEKS PRIOR	✓	✓	✓	✓		Self-Study Review Meeting #3: Continue the standards-based review, reconcile team observations, and prepare for the final evidence review.
30–15 DAYS PRIOR	✓	✓	✓	✓		LMS Evidence Review Meeting: Review information and documentation in the Learning Management System as it relates to the accreditation standards; identify outstanding evidence, questions, or areas requiring clarification.
2 WEEKS PRIOR	✓	✓	✓	✓	✓	Final Program Logistics Meeting: Confirm the final agenda, interview schedule, technology, access, travel or virtual arrangements, participant availability, and other site visit logistics.
✓ Required ✓ Optional All times are relative to the first day of the site visit.						

Fellow Badge Program

The CAHME Fellowship program is designed for individuals who demonstrate the potential to make significant contributions within the field of healthcare management education. Although not required, CAHME encourages all site visitors to apply to become a CAHME Fellow.

While CAHME wholeheartedly extends our recognition and gratitude for the significant contributions of Fellows to future healthcare leaders, we also want to support the ability to share this achievement with others by awarding Fellows with a CAHME physical and digital fellowship badge. The physical badge can be worn or displayed during site visits and the digital badges can be displayed on social media profiles, resumes, websites, email signatures and other platforms, thus helping Fellows to stand out to clients and professional connections. The badges also serve as a visual representation that the Fellow has received up-to-date knowledge and verified skills necessary to become a CAHME Fellow.

Visit the application page for more information on how to become a CAHME Fellow at www.cahme.org



