

Revised 2018



## THE CARIBBEAN ACCREDITATION AUTHORITY FOR EDUCATION IN MEDICINE AND OTHER HEALTH PROFESSIONS

# Guidelines for Accreditation Survey visits

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## Table of Contents

	Page
Introduction .....	1
The CAAM-HP Secretariat .....	1
Purposes of the Survey .....	1
Composition of the Survey Team.....	2
Full Survey Visits .....	2
Limited Survey Visits .....	3
Costing of Site Visits .....	3
Confidentiality of Survey Materials and Team Findings .....	3
The Survey Report .....	4
Notice of CAAM-HP Action .....	5
Feedback to Survey Team Members .....	5
Documents Related to the Accreditation Survey .....	6
Schedule for Accreditation Survey Site Visits .....	7
Site Visit Expenditure Report and Processing .....	7
CAAM-HP Expenses Reimbursement Policy .....	8
The School’s Responsibilities .....	8
Responsibilities of the Team .....	11
Team Chair Secretary .....	11
Team Secretary .....	11
Team Members .....	11
Observers on Site Visits .....	12
Appendix 1- Typical Schedule for a Full Accreditation Site Visit .....	13
Appendix 2 – Documents Available from the CAAM-HP .....	19

## INTRODUCTION

The accreditation process assures that medical and other health professions schools meet standards of structure, function, and performance and assures society and the health professions that graduates of accredited schools meet the education requirements for further training and the health care needs of the people in the Caribbean.

The Caribbean Accreditation Authority for Education in Medicine and Other Health Professions (CAAM-HP) is recognised by the participating countries as the agency for accreditation of educational programmes for qualifying degrees in Medicine, Dental Medicine, Veterinary Medicine, Nursing and other health professions.

The CAAM-HP was established in 2004 by agreement of the participating countries of CARICOM. The CAAM-HP is empowered to determine and prescribe standards and to accredit programmes of medical and other health professions education on behalf of the contracting parties in CARICOM. The CAAM-HP will make its own final decisions about accreditation status.

## THE CAAM-HP SECRETARIAT

The Secretariat offices are located at Suite #7, Pinnacle Pointe, 53 Lady Musgrave Road, Kingston 10, Jamaica (Mailing Address - P.O. Box 5167, Kingston 6, Jamaica)

The Executive Director is Mrs Lorna Parkins.

Further information can be obtained from the Secretariat office and from the CAAM-HP website at <http://www.caam-hp.org/>.

## PURPOSES OF THE SURVEY

Accreditation serves two purposes:

1. To determine if an educational programme is in substantial compliance with accreditation standards
2. To promote improvement in programme delivery (including policies and procedures)

The accreditation process is made up of three steps:

- a. A self-analysis (the institutional self-study) by the school
- b. An on-site review by a team of surveyors
- c. A review of the survey team's written report by the CAAM-HP with determination of the accreditation status

On completion of the survey visit, the team provides an oral report to institutional executives on the programme's strengths, items of partial or substantial non-compliance with accreditation standards, and transition issues, if any. The CAAM-HP determines the status of accreditation and any requirements for follow-up progress reports or site visits on the basis of the survey team's final written report.

Essentially, accreditation asks the following questions:

1. What are the objectives of the education programme?
2. Has the institution organised its programmes and resources to accomplish these objectives?
3. What is the evidence that the school is accomplishing its objectives?

## COMPOSITION OF THE SURVEY TEAM

The Secretariat is responsible for appointing survey teams. The visiting team for a full accreditation survey typically consists of at least four members drawn from a pool of experienced educators, practitioners, administrators, and members of the CAAM-HP. Occasionally, the survey team is joined by a representative observer from an appropriate regional accreditation agency, ministry of education or health.

For a limited survey, the team generally consists of three members.

An individual with extensive experience in the accreditation process is designated as chair. The team member who serves as secretary is responsible for producing the survey report. A member of the CAAM-HP or its professional staff is present on each team to ensure consistency in the assessment process. The Secretariat drafts the visit schedule and coordinates the logistical arrangements with the team and the school.

## FULL SURVEY VISITS

The CAAM-HP Secretariat establishes the survey dates in collaboration with schools referring them to the appropriate documents on the CAAM-HP website approximately fifteen months before the visit. The school should submit its completed education database, self-study summary report, and other pre-survey materials to the Secretariat for transmission to the surveyors at least three months before the site visit.

### Visit Structure

In the two or three months before the visit, the Secretariat finalises the visit arrangements, including the survey visit schedule, and ensures that team members have their specific assignments for the visit and all necessary materials. The Secretariat handles oral and written communication with the school and other team members. All team contact with the school should be through the Secretariat.

Full survey visits normally begin on Sunday afternoon, with a team caucus followed by a meeting with the dean and conclude on Wednesday afternoon after an oral exit conference with the dean and the institution's chief executives. However, this schedule applies to schools using clinical facilities in country. For schools which use clinical affiliates outside of the region the visit may last longer.

During the visit, the team will meet with those persons or groups needed to obtain or verify necessary information, including faculty, students, and administrators. Such meetings should take place without the presence of institutional executives.

The team generally meets privately with the dean only at the entrance and exit conferences. At the exit conference with the dean and university executive (vice-chancellor, president or vice-president), the chair presents a short oral summary report from the team making it clear that this is a preliminary statement of findings and conclusions and not a recommendation or decision on accreditation. He or she will also remind the school that both the oral exit report and the draft survey report are strictly confidential.

After the site visit, the school may be given an opportunity to evaluate the survey team and the accreditation process. The results of any such evaluation are sent under confidential cover to the Secretariat, and are not available to the CAAM-HP when it makes its decisions about the school's accreditation status. Information obtained from the evaluations is used for ongoing review, assessment and improvement of the accreditation process.

## LIMITED SURVEY VISITS

Limited survey visits are focussed on specific issues and are therefore shorter in duration. As in a full survey, team members generally arrive on Sunday for a team caucus and entrance conference with the dean. Visits typically conclude on Tuesday afternoon or Wednesday morning, following an exit conference with the dean and senior university officials.

Instead of the education database and institutional self-study prepared for full surveys, a shorter customised database is completed by the school. Instructions for preparing this 'mini-database' are sent to the school by the CAAM-HP Secretariat at least six months before the visit. The school is expected to submit the completed 'mini-database' to the CAAM-HP Secretariat office at least four to six weeks before the visit. The final report of a limited survey is brief and focussed. The limited visit will involve meetings with institutional administrators, faculty members, and students as needed to address the issues being explored during the survey.

## COSTING OF SITE VISITS

Prior to the start of the visit the Secretariat will have prepared a budget for the cost of the visit (travel, accommodation and meals, honorarium) which is sent to the school for settlement.

The expenses of observers are not the responsibility of the CAAM-HP or of the school.

## CONFIDENTIALITY OF SURVEY MATERIALS AND TEAM FINDINGS

Information about the school, whether contained in the pre-survey documents or obtained on site, is considered confidential and should not be disclosed to other parties. Team members are required to sign a confidentiality statement as well as a conflict of interest declaration before the start of the survey visit. To prevent potential dissemination of confidential materials, team members should destroy written documents about the school, including the database, self-study report, previous survey reports and correspondence between the school and the CAAM-HP, once they have reviewed the draft report.

The team's oral report of findings and conclusions is also confidential. There should be no public release by team members or by the school of any of the findings. The dean and chief executive (president or vice-chancellor) should wait until receipt of the CAAM-HP's letter of accreditation and accompanying final survey report before making any public comments on the site survey. The dean and university executive are provided with final copies of the survey report for public disclosure as they deem appropriate.

## THE SURVEY REPORT

### Timeline for Completing the Survey Report

The following outlines the important timelines regarding completion and processing of the survey report.

7-10 days following survey	Deadline for team members to submit their write-ups to the team secretary
4-6 weeks following survey	Team secretary sends the DRAFT report to the CAAM-HP Secretariat, to each team member for corrections, and finally to the dean of school for correction of any factual errors.
2 months following survey	Team secretary submits final report to CAAM-HP Secretariat
At least 2 weeks prior to CAAM-HP meeting	CAAM-HP Secretariat sends report to members of the CAAM-HP in preparation for the meeting.
2 weeks following CAAM-HP meeting	CAAM-HP Secretariat notifies school of accreditation decision and includes a copy of the final report
2-4 weeks following CAAM-HP meeting	CAAM-HP Secretariat notifies team members of accreditation decision

### Content and Construction of the Survey Report

The report is organised according to the '*Guide for Writing a Report on a Visit of a Survey Team*', available on the CAAM-HP website <http://www.caam-hp.org/>. Appropriate references should be made to the institutional self-study and appropriate education database. The survey team's summary findings should be amply supported by documentation in the body of the report and in the appendices.

## Preparing the Draft Report

To ensure prompt consideration of the school's accreditation status, it is essential that the survey report is completed quickly. Team members should submit electronic typescripts to the team secretary within seven to ten days after the site visit. The draft report should be completed within four to six weeks after the visit. The team secretary should label it 'DRAFT' and submit it to the Secretariat which will forward same to the dean of the school for correction of any factual errors.

Should the dean dispute the tone, findings, or conclusions of the report, and cannot reconcile disputed issues with the team chair and secretary, he or she may write a letter to the CAAM-HP Secretariat for inclusion in the CAAM-HP's consideration of the school's accreditation status.

## Preparing the Final Report

After revisions by the team secretary, the final agreed report should be sent to the CAAM-HP Secretariat. The team secretary should sign the report's cover memo to the CAAM-HP prior to submitting the final report. Final survey reports must be received by the CAAM-HP Secretariat no later than two months after the survey visit, to allow adequate time for review by CAAM-HP members in preparation for the Annual General Meeting.

The CAAM-HP Secretariat should be promptly notified if the team secretary anticipates any delays in providing the final report.

## NOTICE OF CAAM-HP ACTION

When the CAAM-HP meets, it considers and discusses the content of the survey report and makes a decision about the accreditation status of the medical, dental, veterinary or degree nursing education programme. CAAM-HP meetings are held at least once a year and are scheduled by the Secretariat.

After the meeting, the school is notified of the CAAM-HP's action in a letter from the Secretariat to the vice-chancellor/president of the university (or the equivalent chief executive of the academic institution) with a copy to the dean of the school. The letter to the institution conveying the CAAM-HP decision is accompanied by a copy of the final report.

CAAM-HP also advises the CARICOM Secretary-General and Ministers of Education of each Contracting Party of the decision made in respect of each school.

The accreditation status determined by the CAAM-HP is considered public information, but the survey report and its findings remain confidential. However, the surveyed institution is at liberty to make public the survey report and the details of the CAAM-HP decision as it deems appropriate.

## FEEDBACK TO SURVEY TEAM MEMBERS

Following notification to the school, the CAAM-HP Secretariat advises each member of the survey team of the accreditation decision. Team members who wish to have a copy of the final report should contact the Secretariat but are reminded that the report remains confidential.

## DOCUMENTS RELATED TO THE ACCREDITATION SURVEY

The school will be advised to access the education database forms, along with the appropriate Guidelines from the website, about fifteen months before the visit. At this time, the dean of the school being surveyed is guided to review the following background documentation from the CAAM-HP website:

***'Standards for the Accreditation of Medical/Dental/Veterinary Schools or Degree Nursing Programmes'***, containing the CAAM-HP accreditation standards for evaluating the relevant education programmes of institutions in the Caribbean Community.

Both school representatives and survey team members should consult the materials appropriate for their responsibilities in the accreditation process. These may include as relevant:

***'Procedures of the CAAM-HP'***. Describes policies and practices related to the CAAM-HP accreditation, the survey process, accreditation decisions and reporting, development and revision of standards, complaint and appeal procedures, and other policies and procedures of the CAAM-HP.

***'Guide for Writing a Report on a visit of a CAAM-HP Survey Team'***. Describes the organisation and format of reports for full and limited surveys, including the specific topics that should be addressed in a full survey report. Each team member should refer to this document when writing his/her sections of the survey report. Schools undergoing accreditation review may also find it helpful, since it includes the specific questions that team members are expected to address in their evaluation of the education programme.

***'Students' Role in the CAAM-HP'***. Outlines the roles and responsibilities of students in the accreditation process, and provides guidelines for topics to be covered in the student-prepared analysis of the school. The school should be sure that student leaders entrusted with responsibility for managing the student analysis have access to this document.

***'Guides to the Institutional Self-study for Programmes of Education in Medical/Dental/Veterinary Medicine'*** or ***'Guide to the Institutional Self-study for Degree Programmes of Education in Nursing'*** These documents are available to the school as guides for conducting an institutional self-study and for compiling a summary report of self-study findings. They are used by the leaders of the self-study groups, and the individuals participating in the self-study committees.

At about three months prior to the survey visit, the school and survey team members will receive a list of team members with names, titles, and contact information. All contact regarding the CAAM-HP accreditation survey should be coordinated through the CAAM-HP Secretariat.

Survey team members also receive a copy of the prior survey report (and any limited survey reports, if applicable) and copies of any progress reports or annual questionnaires submitted to the CAAM-HP by the school since its last full accreditation survey. Also included is a copy of all official correspondence from the CAAM-HP transmitting accreditation decisions subsequent to the last full accreditation survey.

In the case of a limited survey, a copy of the letter to the school describing elements of the 'mini-database' to be submitted prior to the survey will be appended.



At least three months before the site visit, the dean's office should submit electronically to the CAAM-HP Secretariat the following documents:

- Completed Education Database
- Institutional Self-Study Report
- Independent Students' Analysis
- Required Course and Clerkship Forms

In addition, the school must submit one paper copy of each of the above documents.

## SCHEDULE FOR SURVEY SITE VISITS

### A Full Accreditation Survey Site Visit

A typical example of a full accreditation site visit is attached in Appendix 1. It provides a general guide to the topics ordinarily reviewed during a full accreditation survey and the representatives of the school who would be expected to meet with the team.

In some cases the schedule may be modified to accommodate the distinctive characteristics of the school being visited, being mindful of the need to assess compliance with all accreditation standards during the visit. Sessions may be expanded, shortened, or altered where appropriate to ensure that all topics to be addressed in the survey report are reviewed; if necessary, the team should divide into two groups to provide sufficient coverage of all necessary issues. Any schedule revisions that would result in a visit ending later than the allocated time should be cleared with the Secretariat and communicated to the school so that appropriate arrangements can be made.

The school, in consultation with the CAAM-HP Secretariat, should select the most relevant individuals to participate in each session. The number of participants in any session should not be so large as to compromise the possibility of discussion.

### A Limited Accreditation Survey Site Visit

The first evening (Sunday) meetings preceding the first full day of a limited visit are structured in a format similar to that of a full survey.

The organisation of each day during a limited site visit will depend on the issues to be addressed. The survey will conclude in the same manner as a full survey with an exit meeting.

## SITE VISIT EXPENDITURE REPORT AND PROCESSING

Once the dates for the visit have been agreed, the CAAM-HP Secretariat prepares a budget which includes airfares, accommodation and meals, airport transfers (if necessary) meeting room rentals (for private team meetings) and honoraria for the team. The budget is then submitted to the school for settlement. There is therefore no financial transaction between the school and the team members.

## CAAM-HP EXPENSES REIMBURSEMENT POLICY

### Reimbursable Travel Expenses

Travellers on CAAM-HP business will be reimbursed for all actual travel expenses that are reasonable and necessary. Such claims should be submitted as soon as possible after the completion of travel.

Note that taxi cabs should generally be used for relatively short distances only. For transportation to and from airports, original receipts should be submitted.

### Non reimbursable expenses

The following personal charges are not reimbursable:

- Laundry and valet services
- Exercise facilities
- Entertainment (i.e., hotel in-room movies)

Persons travelling on CAAM-HP business are required to confirm all travel and accommodation arrangements prior to travel. CAAM-HP will not be responsible for expenses incurred outside of the stated dates of arrival and departure.

### Travel and health insurance

Team members are responsible for arranging their own personal travel and health insurance.

## THE SCHOOL'S RESPONSIBILITIES

For a full survey, the school will prepare the appropriate education database during the eleven-month period prior to the survey and submit the required copies to the Secretariat at least three months prior to the survey.

In the case of limited surveys, timelines for submission will be determined by the Secretariat in consultation with the school.

The curriculum vitae of team members will be sent to the dean at least three months prior to the survey. The dean should contact the CAAM-HP Secretariat promptly if any team member is deemed to be inappropriate due to conflict of interest or other valid reasons.

## Visit Coordinator

In preparation for the visit the dean should select a person to coordinate the logistics of the visit. This person need not be the coordinator of the school's self-study process, although the two roles can be combined. This person will serve as the liaison with the CAAM-HP Secretariat about preparations, scheduling and site visit arrangements.

## Completion and Submission of Pre-Survey Materials

About three months prior to the site visit, the dean's office should submit:

- A. the education database (including required Courses/Clerkships and Student Analysis)
- B. the summary report of the institutional self-study task force, and
- C. copies of the school's bulletins and catalogues (bulky documents can be made available to the team at the time of the visit or through links to the school's website.)

At this time, the school should also provide the Secretariat with the name and contact information for the visit coordinator who is the main point of contact between the school and the Secretariat.

Both the survey team members and the CAAM-HP Secretariat will review the database and self-study summary as soon as practical after receipt to ensure that the materials are complete and up-to-date. If any updating is required prior to the site visit, the team chair will communicate the request to the Secretariat; such updated materials should be sent electronically to the team through the CAAM-HP Secretariat.

## Provision of a Team 'Home Room' at the School

The team will require a dedicated home room at the school equipped with internet access and a printer compatible with the operating system used by the team or access to these facilities in an adjacent area. The home room should have a conference table large enough to accommodate the team and school staff attending scheduled meetings. It should be close to the dean's office, so that staff can control access and adjust the schedule as needed. The dean's office should provide any additional material the team may need in the home room, including copies of self-study subcommittee reports and any other documents requested by the team, such as course evaluations, syllabi, etc.

It is helpful to provide tent cards for each team member and those with whom they will meet to assist with introductions as they converse around the conference table. Team members should also wear prominent name tags.

## Student Involvement in the Visit

A well-conducted student survey, with adequate response rate, provides important information for the deliberations of the survey team (see *'Students' Role in the CAAM-HP'*). Survey teams always meet with students. Students should be selected randomly and briefed well in advance of the survey so that they may provide truly representative student input.

The survey team will seek student opinions about a variety of topics, including the quality and adequacy of the educational programme, student academic and personal counselling, health service, financial aid, and the role of students in institutional policy and feedback. Students should also serve as guides in the visits to the library, classrooms, laboratories, learning centres, and clinical facilities.

## The Visit Schedule

The CAAM-HP Secretariat in collaboration with the school and the team finalises the schedule at least three weeks before the team arrives.

The administrators of clinical facilities should be advised that surveyors may be visiting patient care units. The team does not meet with the directors of facilities during the tours unless the team agrees to such meetings as part of the visit schedule. Student guides will conduct the tours. Please note that survey teams will not be expected to view or inspect patient records while touring clinical facilities.

## Exit Conference/Draft Survey Report

Before departing, the team chair will give the dean and the chief executive (vice-chancellor, president, etc.) an oral report of its summary findings. Within four to six weeks, a draft report will be sent to the CAAM-HP Secretariat, who will forward same to the dean. The dean will be asked to correct errors of fact. Any disagreement with the tone or conclusions of the report should be discussed with the team, who will discuss the issues and report back to the dean through the Secretariat on the outcome. If any items in the draft survey report remain in contention after the team's response, the dean may submit written comments directly to the CAAM-HP Secretariat for inclusion in the CAAM-HP's review of the school.

The draft report does not necessarily represent the final report from the CAAM-HP. The draft report must be held in confidence and not released to anyone without authorisation by the CAAM-HP Secretariat.

The school should wait until receipt of the final survey report and accompanying letter of accreditation before making any public comments on the site survey. The dean and university executive are provided with final copies of the survey report for public disclosure as they deem appropriate.

## Site Visit Evaluation

After the site visit has concluded, the dean may be asked to obtain feedback from school representatives about the visit and the accreditation process itself. An evaluation form for that purpose may be sent to the dean at the time of the site visit. This should be completed and returned to the Secretariat after the site visit has been concluded. This evaluation data will not be made available to the CAAM-HP when it reviews the school's accreditation status.

## RESPONSIBILITIES OF THE TEAM

The team should familiarize itself with the major findings of the self-study report and student opinion of the school, its programmes, and its services ahead of the visit taking into account previous survey reports and accreditation history.

The team should review the school's database and self-study summary report for completeness and currency, noting potential strengths, non-compliance issues, or transition areas. These and any important omissions noted should be communicated to the team chair as soon as possible before the visit begins so that requests for additional information can be sent to the school through the Secretariat ahead of the visit. (The CAAM-HP Secretariat will also screen submitted documents for completeness and currency, but does not review them in detail.)

Prior to the entrance meeting with the school's administration/dean, the team will caucus to make any adjustments in the schedule, confirm responsibilities and review ground rules, and prioritize areas needing attention (for example, potential areas of non-compliance with accreditation standards). The team should review the preliminary findings developed by members based on the review of pre-survey materials.

A typical schedule for a full accreditation survey report can be found in Appendix 1.

### Team Chair

The chair reviews the draft schedule to ensure that all relevant issues reflected in the database and self-study summary report can be appropriately explored on site.

The chair serves as the leader of the team's activities on-site and speaks for the team during the survey visit. The chair will assign responsibilities to the team members based on their area of interest/expertise. The chair will introduce team members at each meeting explaining the purpose and focus of the visit. The chair speaks for the team, including presenting the exit report. The chair should see that the team paces its work, so that the identification of strengths and problems is clear.

The chair's exit report should contain all summary findings (strengths, non-compliance and transition issues) to be embodied in the final written report prepared by the team secretary. No written information is presented to the school at the time of the exit meeting.

Like other team members, the chair is responsible for writing sections of the draft survey report. Report sections should address the questions posed in the '*Guide for Writing a Report on a Visit of a CAAM-HP Survey Team*'. The team chair should closely review the completed draft survey report to confirm that summary findings are sufficiently documented and supported in the report narrative and appendices. If the school's dean objects to the tone or conclusions of the report, the team will review the objections and the chair will then communicate the outcome of that discussion to the dean through the CAAM-HP Secretariat as needed.

## Team Secretary

The team secretary is responsible for preparing both the draft and the final survey report based on the written findings and evaluations prepared by team members.

In this task, the team secretary will use the *'Guide for Writing a Report on a Visit of a CAAM-HP Survey Team'* as a template for evaluation and reporting.

## Team Members

Team members are expected to evaluate the educational programme and the resources supporting it, while assessing the level of compliance with the CAAM-HP's standards as set out in the relevant document on 'Standards for the Accreditation of Medical, Dental or Veterinary Schools or Degree Nursing Education Programmes in the Caribbean Community'.

The team members:

- Collect and record additional data and impressions during the visit.
- Contribute to development of the list of institutional strengths, team judgments regarding non-compliance or partial compliance with standards, and areas in transition.
- Provide to the team secretary the assigned, written sections of the survey report, either during the site visit or within seven to ten days thereafter. The *'Guide for Writing a Report on a Visit of a CAAM-HP Survey Team'* is used as a template for evaluation and reporting.
- Review and correct the draft survey report prepared by the team secretary as expeditiously as possible, so that the final report can be formatted and forwarded to the CAAM-HP Secretariat.

## OBSERVERS ON SITE VISITS

At times the survey team may include an observer, who may represent a regional or national accreditation agency or oversight body, a representative of one of the CAAM-HP's contracting parties, or a medical, dental, veterinary or nursing education leader from a foreign country interested in CAAM-HP's accreditation system. The dean of the school being visited must agree to the participation of any observers.

Observers are there to see the process and not to participate in it. Representatives of other accrediting agencies or oversight bodies will not participate in the team's evening work sessions, although they may be invited to join the team for dinner. Such representatives are not authorised to participate in the exit conferences with the dean and university executive.

## Appendix 1 – Typical Schedule for a Full Accreditation Site Visit

Accreditation Visit to [School Name] by Survey Team Representing the CAAM-HP

Visit Date [-----]

Survey team members: (Names; Positions; Institutions)

Chair

Team Secretary

Members

### Day 1: (Sunday)

#### ***Overview of the School's Governance, Administration***

10:00 a.m. *Team caucus*

The team chair goes over the arrangements and assignments and any adjustments are made. A preliminary discussion of members' perspectives of the strengths and weaknesses as gleaned from the documentation.

3:00 p.m. *Meeting with Dean/School Senior Officials*

Dean's perspective: Accomplishments, goals, challenges

Discussion items include:

- Strengths and weaknesses of the school; changes since last CAAM-HP survey, if appropriate; major current issues
- School's goals and directions; principal findings of institutional self-study
- Briefing on management and resources of the college/school including: organisational relationships of college/school with university and teaching hospital(s); organisation of dean's staff; interaction of dean with college's governance organisation, councils, committees and academic departments
- Financial status and projections
- Research programmes and funding
- The status of facilities for education, research and patient care
- Faculty development: appointment tracks, promotion, tenure

## **Day 2: (Monday) The Educational Programme**

Morning

**7:45 a.m. - 8:15 a.m.** Team is collected at hotel (time based on distance to school).

**8:30 a.m.** *Overview of the educational programme: philosophy, learning objectives*

Discussion of the school's educational objectives, outcome measures and how they are integrated throughout the curriculum.

**9:00 am** *Curriculum design, content coverage, methods of teaching and evaluation of student performance (including resident preparation)*

Discussion of the general design of the curriculum; coverage of disciplines and subject areas required by accreditation standards; the appropriateness of instructional methods and student evaluation strategies for the achievement of the school's objectives; and resident preparation for teaching and evaluating students.

**9:45 am** *Curriculum management and programme evaluation*

Discussion of the system for implementation and management of the curriculum; adequacy of resources and authority for the educational programme and its management; methods for evaluating the effectiveness of the educational programme and evidence of success in achieving objectives; comparability of educational experiences at all sites.

**10:30 am** *Team Break*

**10:45 am** *Special programmes, joint degree programmes, research for students or educational innovations*

Discussion of special educational opportunities, MD/PhD and other joint degrees, research opportunities.

**11:15 am** *Tour of pre-clerkship/clinical learning facilities*

Inspection of lecture halls, small group classrooms, labs, and study areas used for pre-clerkship/clinical education of the students. Visit to library and computer learning facilities. The team may be divided or tour as a group.

**Noon** *Lunch with pre-clerkship/clinical students*

Discussion of student life, personal, academic, career and financial counselling, financial aid; health services; infection control education and counselling; student perspective of curriculum, teaching, and evaluation/grading; students' role and perceived value of student input in institutional planning, implementation, evaluation.



## **Afternoon (split team as necessary)**

### **1:30 pm      *Required Courses and Clerkships/Clinical Experiences***

Discussion of notable achievements and ongoing challenges in individual courses and clerkships/clinical experiences; contributions of individual courses and clerkships/clinical experiences in achieving institutional educational objectives; adequacy of resources for education, including availability of faculty to participate in teaching; preparation of residents and graduate students for their roles in student teaching and evaluation.

### **1:30 pm                      *First-year Courses***

### **2:30 pm                      *Second-year Courses***

### **3:30 pm                      *Team Break***

### **3:45 pm                      *Major Required Clerkship/Clinical Experience***

### **5.00 pm                      *Team returns to Hotel***

## **Day 3: (Tuesday): Students, Educational Resources, Finances, Departments, Faculty**

### *Morning (split team as necessary)*

### **7:45 a.m. - 8:15 a.m.              *Team is collected at hotel.***

### **8:30 am      *Academic counselling & Learning environment (including student promotion and dismissal policies and due process issues); & Career counselling; Electives; Fourth-year courses***

Effectiveness of academic counselling, policies and procedures for student advancement and graduation and for disciplinary actions; review standards of conduct and policies for addressing student mistreatment, career guidance strategies; advanced and sub-specialty clerkships/clinical experiences and electives for rounding out clinical education of the students.

### **9:15 am      *Admissions and Minority Affairs; Financial aid & debt management, & Personal counselling, Health services***

Discussion of admissions process, selection criteria, quality of applicant pool and matriculants; policies and goals for diversity; financial aid services and debt counselling; review of student health services, health and disability insurance; personal counselling and mental health services; immunisations and policies regarding exposure to infectious diseases and environmental hazards.

**10:15 am    *Team Break***

**10:30 am    *Library and information technology***

Role of the library and information resources in the educational programme; adequacy of resources and services for the achievement of institutional goals.

**11:00 am    *Hospital tour***

Inspection of educational and student support facilities. Team members should not spend a lot of time reviewing student write-ups of patients or patient charts during the hospital tour. The tour should focus on the areas of student learning and support (conference rooms, library, on-call rooms, etc.).

**Noon        *Lunch with junior and senior student.***

Discussion of student life, personal, academic, career and financial counselling, financial aid; health services; infection control education and counselling; student perspective of curriculum, teaching, and evaluation/grading; students' role and perceived value of student input in institutional planning, implementation, evaluation.

Afternoon (*split team as necessary*)

*If a visit to a geographically remote site is needed, half of the team should use the afternoon block for that purpose while the remaining half reviews departments and institutional finances.*

**1:30 pm    *Finances***

Adequacy of finances for the achievement of the school's missions; recent financial trends and projections for various revenue sources; financial health of and market conditions for the clinical services.

*If the major teaching hospital is owned by the school/university, finances and clinical affiliates may be combined.*

**2:15 pm    *Clinical affiliates***

Meetings with the leadership of each of the major affiliated hospitals. The team may split to allow for individual meetings or the team may meet with all affiliates as a group.

**2:45 pm    *Team Break***

**3:00 pm      *Basic science departments***

Successes and ongoing challenges in administrative functioning of departments; adequacy of resources for all missions (research, scholarship, teaching); departmental support for faculty and graduate programmes, balancing of research and teaching

**3:45 pm      *Clinical departments***

*The team secretary and Chair and the school should determine if it is necessary to meet all of the clinical department chairs, or only those whose departments offer the major required clerkships/clinical experiences. In the former case, the team may need to split to provide adequate coverage.*

Successes and ongoing challenges in administrative functioning of departments; adequacy of resources for all missions (clinical, research, scholarship, teaching); departmental support for faculty and residents; balancing of clinical and academic demands on faculty.

**4:30 pm      *Institutional faculty issues  
(Tenure and promotion, faculty governance, faculty development, etc.)***

Discussion of faculty appointment, promotion, and tenure policies; faculty development opportunities; effectiveness of faculty governance; faculty compensation and incentives; opportunities for collegial interaction among faculty.

**5.00 pm      *Return to Hotel***

**Day 4: (Wednesday) *Faculty, Academic Environment, Exit Conferences***

**7:45-8:15 am      *Team is collected at hotel***

**8:30 am      *Light breakfast with junior faculty***

Discussion of faculty development; positioning for promotion and tenure; teaching and evaluation skills; perceptions of curriculum and students; understanding of institutional goals; role in faculty governance; faculty life.

**9:15 am      *Institutional faculty issues (May include other faculty not otherwise involved.)***

Discussion of appointments, promotion and tenure policies, faculty development, faculty role in institutional governance, opportunities for basic science, clinical faculty interaction.

**10:00 am      *Team Break***

**10:15 am**      ***Graduate programmes***

Discussion of quality and oversight of graduate training programmes in basic and clinical sciences; contributions of graduate students to the learning environment for undergraduate students.

**10:45 am**      ***Team Caucus and Lunch (Private Session)***

**1:00 pm**      ***Exit Conference with Dean***

**1:45 pm**      ***Exit Conference with University Leadership and the Dean***

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**Additional notes on the example visit schedule:**

- A. Because of the limited time available for the initial team caucus, team members may be asked to submit their preliminary assessments of strengths and potential problems to the secretary in advance of their arrival. The team chair can then assemble a preliminary list of findings for discussion during the initial caucus.
- B. If a visit to one or more geographically remote sites is required, the team secretary through the Secretariat in consultation with the dean rearranges events; e.g. the meeting to discuss finances could be conducted late in the morning on Day 3 (where the hospital tour is indicated in the schedule). The team can then divide to visit the remote campus before or after lunch with students in the last two years of the course.
- C. This schedule can be adjusted in cases where clinical training is conducted in hospitals outside of the region. In such cases the visit will last longer.

## APPENDIX 2 - Documents available from the CAAM-HP

- Summary of the Accreditation Procedures for Established Schools
- Procedures of the Caribbean Accreditation Authority for Education in Medicine and Other Health Professions
- Standards for the Accreditation of Medical Schools in the Caribbean Community
- Standards for the Accreditation of Dental Schools in the Caribbean Community
- Standards for the Accreditation of Veterinary Schools in the Caribbean Community
- Standards for the Accreditation of Degree Nursing Programmes in the Caribbean Community
- Standards for the Accreditation of Nutrition and Dietetics Degree Programmes in the Caribbean Community
- Accreditation Guidelines for New and Developing Schools
- Students' Role in the Caribbean Accreditation Authority for Education in Medicine and Other Health Professions
- Guidelines For Accreditation Survey Visits
- Guide for Writing a Report on a Visit of a Survey Team
- Guide to the Institutional Self-Study for Programmes of Education in Medicine
- Guide to the Institutional Self-Study for Programmes of Education in Dental Medicine
- Guide to the Institutional Self-Study for Programmes of Education in Veterinary Medicine
- Guide to the Institutional Self-Study for Degree Programmes of Education in Nursing
- Instructions for Completing the CAAM-HP Medical Education Database and Institutional Self-Study
- Instructions for Completing the CAAM-HP Dental Education Database and Institutional Self-Study
- Instructions for Completing the CAAM-HP Veterinary Education Database and Institutional Self-Study
- Instructions for Completing the CAAM-HP Nursing Education Database and Institutional Self-Study
- Medical Education Database
- Dental Education Database
- Veterinary Education Database
- Nursing Education Database
- Database Form for Required Courses and Clerkships for Medicine
- Database Form for Required Courses and Clerkships for Dental Medicine
- Database Form for Required Courses and Clerkships for Veterinary Medicine
- Database Form for Required Courses and Clerkships for Nursing
- Annual Medical School Questionnaire
- Annual Dental School Questionnaire
- Annual Veterinary School Questionnaire

All of the above documents are available on the CAAM-HP website at: [www.caam-hp.org](http://www.caam-hp.org)