

REPORT OF THE STANDING COMMITTEE ON SITE VISIT PROCESS AND TRAINING

Background: At its August 2020 meeting, the Commission on Dental Accreditation (CODA) considered ongoing operations in response to the COVID-19 pandemic and the impact on site visits. The Commission also directed the appointment of an Ad Hoc Committee to study virtual site visits, including development of policies and procedures for the conduct of virtual visits, for consideration by the Commission in Winter 2021. The Ad Hoc Committee on Alternative Site Visit Methods met from Fall 2021 through Summer 2023 related to alternative site visit methods required in response to the COVID-19 pandemic. In Summer 2023, the Ad Hoc Committee noted that a change to CODA's current site visit process was not warranted. However, the Committee believed CODA should continue to monitor the Department of Education's regulations related to site visit processes permitted for use by recognized accrediting agencies. The Committee also believed the ongoing review of CODA's site visit process, including feedback from programs and site visitors through CODA's Post Site Visit Survey and the ongoing training of site visitors, aligns with CODA's strategic plan for continuous quality improvement of the Commission. While no changes were warranted to the site visit process at that time, the Ad Hoc Committee believed that the Commission should transition the Ad Hoc Committee to the "Standing Committee on Site Visit Process and Training." At its Summer 2023 meeting, the Commission concurred with the recommendations of the Ad Hoc Committee and directed formation of the Standing Committee on Site Visit Process and Training, with the following Charge.

Standing Committee on Site Visit Process and Training:

- Monitor trends and USDE regulations related to CODA's site visit process;
- Evaluate site visit feedback from site visitors and programs;
- Review and develop protocols and materials to enhance the site visit process;
- Oversee and provide input on training for new and reappointed site visitors;
- Oversee and provide input on training for programs preparing for site visits; and
- Oversee and provide input to educate new program directors on working with the Commission.

Report of the Standing Committee on Site Visit Process and Training: The Standing Committee on Site Visit Process and Training met via a virtual meeting on January 15, 2025. **Committee Members:** Dr. Frank Licari (chair), Ms. Margaret Bowman-Pensel, Dr. Ngoc Chu, Dr. Cherae Farmer-Dixon, Dr. Paul Luepke, Dr. Monica Nenad, and Dr. Miriam Robbins were in attendance. Dr. Deborah Weisfuse was unable to attend the meeting. **Commissioner:** Dr. Frank Licari, committee chair, and chair, and Dr. Cataldo Leone, vice chair, Commission on Dental Accreditation (CODA), *ex officio*, were in attendance. **Commission Staff:** Dr. Sherin Tooks, senior director, Ms. Peggy Soeldner, senior manager, and Ms. Jamie Asher Hernandez, Ms. Jessica Lynk, Mr. Shawn Morrison, Dr. Yesenia Ruiz, and Ms. Taylor Weast, managers, CODA were in attendance, and Ms. Kelly Stapleton, manager, CODA attended a portion of the meeting.

The Standing Committee began its discussion with a review of its Charge.

Training and Enhancements (2024): The Committee discussed the training programs and process enhancements completed in 2024 (**Appendix 1**) as well as potential future training programs and process enhancements (**Appendix 2**). The Committee noted that virtual training options appear to be preferred by CODA's site visitors and the educational programs. The Committee discussed that a significant number of training programs were offered in 2024, with additional training, including micro videos (i.e., short on-demand videos on specific topics) will be created in 2025. The Standing Committee also learned of the recent hire of a new position within CODA, the Manager, Training and Assessment, who will work with the CODA Senior Director, Senior Manager, and Managers to enhance current training programs and develop new programs.

The Standing Committee received an update on the Commission's Summer 2024 directive that CODA staff survey active site visitors related to themes occurring on site visits, and conduct mandatory site visit chair training, beginning with predoctoral dental site visit chairs, and subsequently all other discipline-specific site visit chairs, with updates on progress through reports to the Standing Committee on Site Visit Process and Training and the Commission. The Standing Committee learned that in September 2024, a survey was sent to all active site visitors asking for a brief statement on themes or questions that have arisen during a site visit, or Standards, for which site visitor(s) would like additional clarification or training. The Commission received 113 responses, and many of the responses were used to create the subsequent Predoctoral (Dental School) Chair Calibration and Training, which occurred in Fall 2024. The Committee noted the success of the Predoctoral Chair Training and CODA staff's plan to continue this training in 2025 and apply similar training scenarios for allied dental and advanced dental chair training in this coming year.

Related to future training enhancements, found in **Appendix 2**, the Standing Committee suggested that CODA staff include the timeline and mechanisms for CODA review, and next steps, when producing micro videos, to educate programs on how to prepare and submit various types of Commission reports and the steps taken for Commission review. The Standing Committee also believed that some aspects of the site visit could be enhanced with implementation of the new electronic accreditation system, noting training will occur for all users at the appropriate time. For example, the new tool may allow teams to pre-review the program's material and communicate directly with the program to request information in advance of the site visit. This process may require that more self-study information be preloaded to the electronic portal, rather than available on-site, and may require that the self-study be submitted earlier than is currently required. Additionally, it may help programs and site visitors to establish discipline-specific lists of required materials for each Standard, so that there is some level of consistency within the submission process, which could also lead to calibration of program reviews. The Standing Committee will discuss these enhancements at a future meeting.

Electronic Accreditation System and Learning Management System: The Standing Committee considered the two (2), Summer 2024 Commission directives related to technology enhancements to improve the accreditation process and training.

First, the Commission on Dental Accreditation directed CODA staff to investigate potential Learning Management Systems, with a report of findings for the Winter 2025 Commission meeting. The Standing Committee learned that Commission staff is working with Information Technology (IT) staff and the software vendor related to the electronic accreditation system, which may include a component of the system that can be used as a Learning Management System (LMS). The vendor indicated that the electronic accreditation system includes an out-of-the-box platform for LMS utilization. A demonstration of the system was planned for CODA staff on January 17, 2025, with more information to be provided to the Committee and Commission as available.

Second, the Standing Committee reviewed an update on the Commission's directive that Commission staff investigate the capabilities of the Electronic Accreditation System, with a report of findings for the Winter 2025 Commission meeting. The Standing Committee received an update, noting that Commission staff continues to work on this initiative, and meetings with ADA IT and the electronic accreditation system vendor occur biweekly. The vendor is currently building the application/self-study portal and reviewing data configuration in alignment with the transfer of data from CODA's current database to the new system. Again, the Committee noted that additional information, and future demonstrations, will be provided as available.

Site Visit Feedback: The Standing Committee reviewed redacted 2024 Post Site Visit Survey data, from both programs that were site visited and site visitors conducting the visits. Generally, most comments were positive. There were several comments focused on logistics (i.e., travel and hotel quality), while other comments focused on calibration of the site visit team. The Standing Committee noted that the Chair training programs are underway to help calibrate site visit chairs, who can then calibrate the site visit team. The Standing Committee suggested more case-based scenarios for training and calibration on interpretation of Standards and understanding bias. The Committee discussed metrics that may be used to assess calibration, and believed that a validated process to measure calibration may be difficult to establish, since there is no clear way in which to determine if a site visitor appropriately cites (or appropriately does not cite) recommendations while conducting the site visit, given the specific facts and reviews (both in advance and on-site) that comprise each site visit. The Standing Committee also noted site visitor comments that they would appreciate having a list of standard questions to ask during on-site interviews with specific groups. The Committee learned that CODA staff have developed a question list and shares this information with new site visitors. It was discussed that the Site Visit Question List by Interview Type could be expanded and shared with all site visitors on a routine basis.

Summary: Following consideration of the meeting material, the Standing Committee believed that the Commission should continue to work toward developing and implementing the training programs outlined in the future training programs and process enhancements (**Appendix 2**), and as discussed in the meeting (noted above).

Recommendations: This report is informational in nature, and no action is required.

Training Provided and Enhancements to Process (January - December 2024)

Training/Information for Programs:

- Program Director 101
 - March 9, 2024 (at ADEA meeting) – about 20 people
 - April 11, 2024 (virtual) – 305 people
 - Materials posted to CODA website for on-demand access:
<https://coda.ada.org/site-visitor-resources>
- Q&A Session – March 10, 2024 (at ADEA meeting) – about 120 people
 - Materials posted to CODA website for on-demand access:
<https://coda.ada.org/site-visitor-resources>
- Site Visit Orientation – April 8, 2024 (virtual)
 - Predoctoral – 75 people
 - Advanced – 113 people
 - Allied – 155 people
 - Materials posted to CODA website for on-demand access:
<https://coda.ada.org/site-visits/coda-dds-dmd-site-visits>
<https://coda.ada.org/site-visits/advanced-dental-site-visits>
<https://coda.ada.org/site-visits/allied-dental-site-visits>
- Allied Dental Program Directors CODA Update (at ADEA Allied Director’s Meeting) – 200 people

Training/Information for Site Visitors:

- Site Visitor Update – April 15, 2024 (virtual)
 - Predoctoral – 70 people
 - Advanced – 71 people
 - Allied – 82 people
 - Materials posted to CODA website for on-demand access:
<https://coda.ada.org/site-visitor-resources>
- Chair Training
 - Advanced – May 16, 2024 – 15 people
 - Allied – June 25, 2024 – 6 confirmed and 5 more to RSVP
 - Predoctoral Chair Training – October 14, 2024 -24 people

- Site Visitor Training (New Site Visitors, Returning Site Visitors, and Invited Review Committee and Commission Members) – June 13-14, 2024
- Survey of Site Visitors to Obtaining Questions and Scenarios for Future Training– August 27 – September 9, 2024

Enhancements to Site Visit Process (Protocols and Materials):

- Reviewed and Updated Site Visit Letters to Programs
 - Letter 2, 3, IA Developing – Allied and Advanced
 - Letter 3 – Predoctoral
 - Special Focused Site Visit and PACV Letters
 - Updated and enhanced email templates for site visit mailings
- Updated/Enhanced Educational Activity Site Form
 - To align with data reported in site visit report.

Enhancements to Guidelines and Documents Programs (Protocols and Materials):

- All Guidelines (To reflect New Verification Info)
- Completely Revised PACV Post-Observation Individual Consultation Materials and Presentation
- Revised all CODA Standards and documents, with web postings, following each CODA meeting.

Future Training and Enhancements to Process
(To be conducted and/or developed; **Blue** is priority; **Red** is an update)

Training/Information for Programs:

- Program Director 101 – Spring 2025
- Q&A Session – Spring 2025
- Site Visit Orientation Spring 2025
 - Predoctoral
 - Advanced
 - Allied
- Create Micro-Videos for Programs:
 - Understanding Advanced Standing
 - Reporting Program Changes
 - Preparing an Electronic, Bookmarked Reports
 - Enrollment Increases

Training/Information for Site Visitors:

- Site Visitor Update – Spring 2025 – include more scenario-based training
 - Predoctoral
 - Advanced
 - Allied
- Chair Training (Scenario-Based Calibration Training)
 - Predoctoral – Fall 2024 – completed, with additional sessions in spring 2025, and handout to be circulated to chairs
 - Advanced – 2025
 - Allied – 2025
- Site Visitor Training (New Site Visitors, Returning, and Invited Review Committee and Commission Members) – June 2025
- Create Post-Training Survey for Each Session
- How to Review a Program Application for Accreditation

Enhancements to Site Visit Process (Protocols and Materials):

- Continue to Review Site Visit Letters and attachments to clarify, streamline and enhance pre-site visit communications. Updates made to email templates, letters and enclosures.

- Develop Site Visitor Manual, with sections for Predoctoral, Advanced and Allied.

Enhancements to Guidelines and Documents Programs (Protocols and Materials):

- Develop Process Charts for Programs to Report Changes (See most recent PD 101)
- Modify Guidelines to Create Working Table Format for Submission
- Review Self-Study Guides and Site Visit Schedules; increase length of IA visit (predoc)