

CACB

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CANADIAN ARCHITECTURAL  
CERTIFICATION BOARD

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# VIRTUAL SITE VISITS REQUIREMENTS AND PROCEDURES

**Accreditation Program**

**2021 Edition**

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## Introduction

In reaction to the COVID-19 pandemic, the CACB has developed a virtual format of the Accreditation Visits to monitor the impact of the outbreak on architectural education and on the conditions for accreditation.

The CACB's primary concern is to support and ensure the health and safety of the programs and the visiting teams. In that effort, the CACB has approved the implementation of the Requirements and Procedures outlined in this document.

The intent of this document is to ensure that virtual visits are conducted with the same purpose, rigor, and principles of an in-person visit as outlined in *the CACB Procedures for Accreditation*.

The Virtual format does not replace the in-person format. It is an exceptional alternative meant to be used when a in-person visit is not possible.

This document serves as an advisory supplement to the *CACB Procedures for Accreditation*. Thus, on matters of policies and procedures, the *CACB Conditions and Terms for Accreditation* and *CACB Procedures for Accreditation* supersede all information in this document.

## 1. Virtual Site Visits

### 1.1. Participation Requirements

To participate in a virtual site visit, programs must be able to demonstrate the following:

- The ability to allow the site visit team to securely view confidential documents while maintaining control of the documents.
- The ability to facilitate the site visit team's interaction with an acceptable number of representatives of the institution and the standard constituent groups who typically participate in CACB accreditation site visits.
- The program director or other authorized program representative must sign and submit an electronic copy of the Virtual Site Visit Agreement form (**Appendix B**).

By signing this form, the program verifies that it meets the minimum participation requirements, the additional scheduling and the conduct parameters for a virtual site visit. In addition, the program agrees to accept the report of the virtual site visit team and acknowledges that it cannot, at a later date, request a new site visit with a different format, or appeal the resulting accreditation decision solely on the basis of the virtual format of the site visit as long as the virtual site visit is conducted in reasonable conformity with the *Procedures for Accreditation* and other applicable CACB standards, policies, procedures, and guidelines.

### 1.2. Establishing the Dates and Team for the virtual site visit

The site visit team will be appointed in accordance with the *current CACB Procedures for Accreditation*. The virtual site visit dates will be established in collaboration with the team chair and program director.

As part of the virtual site visit requirement, the majority of evidence, including student work, will be available for review-starting from 45 days before the visit. As a result, virtual site visits will be shorter in duration than visits that occur on-site.

A virtual visit for initial and continuing of accreditation will generally begin on Monday and conclude on Wednesday afternoon. A virtual visit for candidacy will generally begin on Monday and conclude on Tuesday afternoon.

## 2. Technology for the virtual site visit

The virtual site visit will utilize various technology platforms to replicate the steps of an in-person visit:

- Zoom videoconferencing software will be utilized to provide a virtual team room and to facilitate all meetings.
- Filesharing hosted by the program will be utilized to “store” the materials typically held in the team room and make them available for “viewing” by the team.
- Filesharing hosted by CACB, using its own platform, will be utilized to facilitate the team’s work.

### 2.1. Zoom Requirements

- All participants must have their own meeting space and the ability to log in separately to the meetings. Multiple participants are not permitted to share a single screen.
- Participant should join the meeting in a quiet space without distractions.
- CACB will use a Zoom waiting room for approved access to all meetings with individuals outside of the team.
- All participants must have their video on and be visible on screen throughout the meeting. CACB will not accept picture placeholders or blank screens with names for participation in the meeting. Anyone using picture placeholders or blank screens with names will not be permitted to participate in the meeting.
- Most meetings specifically exclude a number of targeted participants. For example, Teaching Staff shall not attend the student meetings. Supervisors shall not attend support staff meetings. During the Virtual visit, excluded participants shall not be permitted to listen to the meetings out of camera range and they must not be in visual contact with the approved participants. The Team Chair shall notify the participants of each meeting of this requirement.
- CACB will not record any of the meetings. CACB prohibits the recording of the meetings by the program, institution, and/or any of the meeting participants.
- Each participant should have earphones/buds available during the meeting to ensure proper audio quality, if needed.
- Before the virtual site visit, all meeting participants must download the Zoom Client for Meetings app, available at the [Zoom Download Center](#), and use Zoom to access meetings.
- All participants must use a laptop, PC, or tablet with dedicated keyboard to access Zoom.
- Screen sharing should not be used during videoconferencing between program representatives and the visiting team.
- The Zoom chat function should only be used to communicate issues with audio or video.

## 2.2. Backup/Contingency Plan

If a meeting participant has trouble accessing the videoconferencing for a meeting via a PC, laptop, or tablet, he/she should notify the team chair and CACB staff at [accreditation@cacb.ca](mailto:accreditation@cacb.ca), as soon as possible. If the situation cannot be resolved quickly, the participant should use his/her cell phone to dial in to the meeting and may participate by audio only. Cell phones should only be used in situations where efforts to resolve the access to the videoconference are unsuccessful.

Should technical difficulties such as power failure, internet issues, or an act of nature interfere with the visit, the use of cell phones will be the immediate backup plan. All participants should be advised to have hard copies of the Zoom dial-in numbers available for cell phone access. In the event the visiting team is not able to complete its review, including the review of documents or to conduct meetings with required participants due to problems with technology or for any other reason, CACB, in its sole discretion, may schedule another virtual site visit.

## 2.3. File Sharing

CACB offers [Nextcloud](#) as the file-sharing platform for the virtual site visit, and the CACB will provide the visiting team with login credentials.

Dedicated site will be allocated and used to host and share:

- the APR.
- the VTR template and final VTR document, with confidential team recommendations.
- materials related to logistics (e.g., virtual site visit agenda, Zoom attendee lists, Zoom links, etc.).

The program will choose a method by which it will host and permit the viewing of the team room contents by the visiting team that accomplishes the following:

- Forty-five (45) days before the visit, the program will securely host, and provide access to the visiting team:
- All student studio work and course notebooks.
- Faculty photos.
- SPC matrix/matrices.
- The virtual video tour of the facilities (see “Before the Visit”).

During the visit, and in accordance with the Privacy policy, the program will permit the visiting team to securely view student admissions files while maintaining control of the records at all times.

The team chair and program director will identify the time in the agenda schedule for team review. These documents should not be transferred to the team in any way. The mechanism for reviewing these documents should be via a secured channel for review only.

Access to these documents should be provided in accordance with institutional protocols, to include non-disclosure agreements, if required.

If the visiting team requests additional evidence during the visit, the program will securely grant access to such evidence by uploading it to a folder marked “Additional Evidence,” utilizing the same file-sharing method as that of the original evidence.

### **3. Planning for and conducting the virtual site visit**

The following roles and responsibilities for a virtual site visit for the CACB staff, the visiting team chair, and the program director are in addition to or in lieu of the standard roles and responsibilities delineated for an in-person visit.

#### **3.1. Before the Visit**

CACB staff will:

- Schedule a Zoom meeting with the program director and the team chair after the date of the visit has been set to confirm the program's readiness for a site visit, provide an overview of the virtual site visit planning process, and address logistical questions.
- Schedule Zoom meetings with the team members and with the program director to provide training on the technology that will be used during the visit, ensure that CACB team members have the requisite audio/video capabilities, and ensure that participants understand and agree that no part of the virtual site visit may be audio and/or video recorded.
- Schedule Zoom meetings for the team to review materials and prepare for the virtual site visit. Schedule all meetings on the virtual site visit agenda after the meeting times have been confirmed by the program director. Staff will provide the Zoom login details to the program director.
- Invite the visiting team to each Zoom meeting scheduled for the visit.
- Upload the necessary documents to the visiting team's Box folder.
- Attend all pre-site visit planning meetings.

The program director will:

- Participate in pre-visit meetings and test runs with CACB staff, the team chair, and team members to ensure that any problems with the technology for the site visit are identified and corrected. The goal of the pre-visit planning is to confirm the program's readiness for a virtual site visit and identify major aspects of the site visit, including connecting with some test constituents to ensure access to Zoom and materials through screen sharing or via secured connection.
- Ensure that all potential participants have the requisite audio/video capabilities and review the Zoom guidelines with them.
- Develop with the team chair the virtual site visit agenda, including times for all meetings, and send final agenda to CACB staff, no later than one (1) week before virtual site visit. The optional meeting with graduates and local practitioners and optional faculty exhibit will not be conducted as part of the virtual site visit.
- Develop a virtual/video tour of the program's facilities for the team that includes a typical classroom, studio, critique space, office, and the shops, labs, and libraries and make available to the team 45 days before the visit. If it is not feasible for a virtual tour to be

developed because the campus is closed, the program director will need to discuss/coordinate with the team chair; the visiting team will note in its report that at the time of the visit the team was only able to review written and graphic support in relation to the facilities.

- Establish a secure method to share team room contents and grant the visiting team credentials for access and review 45 days before the visit.
- Prepare a secure method for permitting the team to view confidential student records for use during the visit.
- Forward Zoom access/login information received from CACB staff to relevant meeting participants.
- Ensure the confidentiality of all meetings.
- Provide final lists of attendees for all meetings to the team chair and CACB staff a minimum of one (1) week before the start of the meeting. Any modifications following the provision of the final list should be discussed with the team chair.
- Ensure that all meeting participants understand the guidelines for participating in the videoconference meetings.

The team will:

- Engage in pre-visit planning by attending the required meetings and working with CACB staff and the program director to conduct a review of materials and prepare for the visit.

### **3.2. During the Visit**

CACB staff will:

- Open the Zoom meeting room approximately 10 minutes before the start of the meeting.
- Act in a support capacity for the visiting team and institution regarding the use of technology and logistical considerations.
- Allow entry into the meeting room from the Zoom waiting room, working from the approved attendee list provided by the program director.
- CACB staff may be assigned to attend meetings.

The program director will:

- Ensure that all participants understand and agree that no part of the site visit may be audio and/or video recorded.
- Facilitate the secure viewing of confidential student records at the designated time.

### **3.3. After the Visit**

CACB staff will:

- Remove Nextcloud access to and content from the designated Box folder for the visit.

The program director will:

- Remove access to the university-hosted file-sharing platform(s).

## 4. Virtual Meetings

### 4.1. Meeting Access/Log-In

To avoid confusion about who is logging in to which meeting, CACB staff will create each Zoom meeting and will provide the Zoom login details to the program director, using the format below. The program director will forward login details to the participants in each meeting.

MEETING	ZOOM LINK	[Enter program and Visiting Team time zones]
Meeting .....	[Insert Zoom Link, Meeting ID, and Passcode Specific to Meeting here]	9:45 am- 10:45 am
Meeting .....	<a href="https://us02web.zoom.us/j/12345678901?pwd=aSAzdMPLcElxLI52N1K1bG">https://us02web.zoom.us/j/12345678901?pwd=aSAzdMPLcElxLI52N1K1bG</a>	11:00 am- 11:45 am

Once the agenda is confirmed for each meeting, the program director will send a list of participant names and emails, organized by meeting, to the team chair and CACB staff.

Excluding the visiting team members, Zoom meetings should have a maximum attendee count of 20 people, with the exception of program-wide meetings with faculty or students, which should have a maximum attendee count of 100. These numbers are intended to improve the effectiveness of virtual meetings and ensure that all program participants and visiting team members are visible on screen. Large programs may need to schedule several meetings in order to remain under the maximum attendee count, or the program may consult with the team chair about increasing the maximum attendee count. Programs that offer additional degrees beyond the CACB-accredited degree(s) under review should give priority to students enrolled in the CACB-accredited degree(s) for the all-student meeting.

## 5. Pre-Visit Planning for Virtual Site Visits

CACB will assign a staff member to attend all pre-visit meetings, to be held during weekdays. Materials due to CACB 45 days before the virtual site visit:

- Video tour of facilities.
- Link to and credentials for accessing student work must be provided 45 days in advance.

### 5.1. Meeting # 1 (42-45 days in advance)

Participants: team chair, program director, and CACB staff.

Readiness for Visit

- Team chair and program director meet to determine whether the program is ready for the virtual visit.
- Program director performs walk-through of the student work compilation for team chair.

**5.2. Meeting # 2** (38-40 days in advance)

Participants: visiting team, program director, and CACB staff

Process and technology overview: visiting team and program director

- CACB staff conducts overview of the virtual site visit process and technology.
- Program director reviews access to student work.

Assignments and review expectations for team: visiting team only

- Team chair provides expectations for how the team will work.
- Team chair makes review assignments.

**5.3. Meeting # 3** (28-30 days in advance)

Participants: visiting team, and CACB staff

- Team members review the APR and the Conditions and Procedures, discuss visit protocols, identify missing materials or documents.
- Team members discuss their initial reactions to the APR and student work; raise any initial concerns; and identify and prioritize the questions to be addressed during the documentary review.

**5.4. Meeting # 4** (14 days in advance)

Participants: visiting team, and CACB staff

- Team members review the results of the documentary review (see below), prepare questions to be addressed during the visit, and identify any other areas of inquiry
- Team chair may revise details of the agenda.
- Team develops a draft of the VTR.

During the visit, Staff member may be assigned to a visit to provide logistical support.

## Appendix A: virtual site visit agenda template

University Name Department/School Name  
CACB Virtual Site Visit

### Monday, Month/date – Wednesday, Month/date, Program Considerations in Planning:

- Meeting start times should be adjusted in consideration of the location of team members and the institution.
- In advance of virtual site visit, the program director should send meeting invitations to all constituent groups with the links, provided by the CACB staff, to access the video conference for their specific meeting.
- The program director should help ensure everyone is prepared to use the meeting technology. CACB will test the technology with the program ahead of the visit.
- Given the limits on the number of participants in all-student and all-faculty meetings, the program director, in collaboration with the team chair, should decide whether more than one meeting with these groups is necessary.

**Note:**

- 1- The virtual site agenda items must comply with those of the appropriate agenda templates of the Procedures for accreditation: A1, A2, or A3
- 2- Additional team planning-meetings may be scheduled at the discretion of the team chair.

### DAY ONE

Monday, Month/date/year

MEETING	ZOOM LINK	Time Zones				
		Pacific PST	Mountain MST	Central CST	Eastern EST	Atlantic AST
Meet with Program Director	<a href="https://us02web.zoom.us/j/1234567890">https://us02web.zoom.us/j/1234567890</a>					
Virtual Tour						
Break						
Team Meeting						

**DAY TWO**

Tuesday, Month/date/year

MEETING	ZOOM LINK	Time Zones				
		Pacific PST	Mountain MST	Central CST	Eastern EST	Atlantic AST
Meet with Program Director						
Entrance Meeting with the University President and Provost ( Chief Academic Officer)						
Entrance Meeting with the Dean						
Break						
Entrance Meeting with faculty						
School-wide Entrance Meeting with students (for eligibility/initial candidacy, no meeting if no students)						
Team Meeting						

**DAY THREE**

Wednesday, Month/date/year

MEETING	ZOOM LINK	Time Zones				
		Pacific PST	Mountain MST	Central CST	Eastern EST	Atlantic AST
Meet with Program Director						
Observe classes/work time (optional)		7:30am-8:15am	8:30am-9:15am	9:15am-10:15am	10:15am-11:15am	
Meet with students Representatives		8:30am - 9:00am	9:30am-10:00am	10:30am - 11:30am	11:30am-12:30pm	
Break						
Exit Meetings						
Team Meeting						

## **Appendix B: Virtual Site Visit Policy and Disclosure Agreement**

### **Virtual Site Visits Participation Requirements**

#### **Before the Visit**

- The program will submit its APR to the CACB, as scheduled. The program will provide all supporting evidence, including student work and exhibits, 45 days before the visit.
- The program will provide any additional requested materials before the site visit.
- The program director should ensure that the technology needed to support meetings with faculty, directors, students, and staff is set up and in good working order before the visit. The program must have the capability to use the Zoom videoconferencing platform and file-sharing software.
- The program must develop and disseminate contingency plans to all participants in the event of unforeseen acts of nature or technological difficulties, such as power loss, bandwidth issues that prevent videoconferencing or file sharing.
- The program director will work with the CACB staff to develop a virtual visit agenda and schedule meetings as necessary to complete the work of the visit.
- The program will provide a recorded video tour of program facilities, as required by the CACB *Conditions and Procedures*.
- The program will participate in the pre-visit planning and scheduled test run to ensure any problems are identified and corrected. The test run will focus on major aspects of the site visit.

#### **During the Visit**

- The program director will ensure that the visiting team has adequate opportunity to engage in all required meetings with strict adherence to the virtual site visit agenda.
- All individuals participating in Zoom meetings must preregister and be sure the name entered into their individual Zoom profile matches the name listed on the site visit schedule.
- If for any reason the visiting team is not provided with the opportunity to hold required meetings for technological or other reasons, the CACB will reschedule the site visit.
- The program director will ensure the confidentiality of all meetings.
- No one other than individual(s) listed in the virtual site visit agenda may be present in the meeting room during interviews with visiting team members.
- Legal counsel shall not be present at any stage of the virtual site visit.
- No part of the site visit may be audio recorded. Video cameras other than the computer camera for Zoom meetings may not be used.

#### **Virtual Site Visit Process**

- The virtual visit will replicate, to the extent possible, the standard format and activities of an in-person site visit. Actual dates for meetings will be determined by the visiting team chair and the program director in advance of the visit.
- The CACB staff will provide Zoom meeting rooms for each session on the schedule and will coordinate the technical aspects necessary to establish each meeting.
- The program is responsible for working with all attendees other than site visitors to ensure that participants have the appropriate equipment to participate in the sessions with video. The

CACB requires all attendees to participate with audio and video.

- The CACB uses Zoom products that fall under the Zoom Privacy Policy. The institution and the program acknowledge that they are informed of and agree to the Zoom Privacy Policy.
- The CACB requires passwords for participation in all site visit meetings and will utilize the Zoom Waiting Room feature. Any Zoom URLs or passwords provided by the CACB will be confidential and will be given out by the institution and program only to the extent necessary to complete the site visit.

### **Acknowledgment**

I have read and agree with the foregoing requirements for the program to participate in a virtual site visit by the CACB. I understand that unless the CACB requires otherwise, the virtual site visit will be the only visit conducted by the CACB as part of the accreditation process and that the results will become part of the record to be reviewed by the CACB in making its decision on accreditation of the program.

As the authorized representative of the program, I agree that the program will not challenge the results of the visit or the CACB's decision relative to the (re)accreditation of the program for reasons related solely to the visit being conducted virtually (with the use of digital media) as long as the virtual site visit is conducted in material conformity with the *2017 CACB Procedures for Accreditation*" and other applicable CACB standards, policies, procedures and guidelines.

**Institution Name:** .....

**Program Name:** .....

\_\_\_\_\_  
**Program Director Name**

\_\_\_\_\_  
**Signature**

\_\_\_\_\_  
**Date:**

\_\_\_\_\_  
**Dean Name**

\_\_\_\_\_  
**Signature**

\_\_\_\_\_  
**Date:**

## Appendix C: Required Zoom Settings

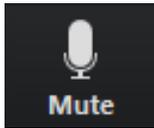
Here is a helpful video on logging into Zoom: <https://www.youtube.com/watch?v=hIkCmbvAHQQ>

### Audio Settings

#### Mute/Unmute:

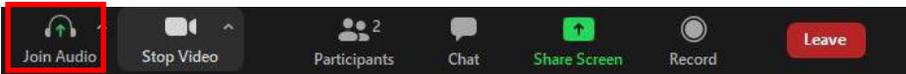
To avoid audio echo, you must mute yourself upon entry and when you are not speaking by:

1. Clicking the Mute/Microphone icon:



#### Connecting Computer Audio:

- Join the Zoom meeting.
- You will be prompted to join the audio automatically
- If this prompt does not appear or you close out of it, click Join Audio in the meeting controls.



- Under the “Computer Audio” tab, click “Join with Computer Audio.”



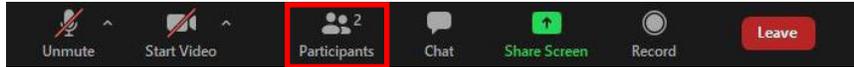
Here is a helpful video on how to test your computer audio: <https://youtu.be/-s76QHshQnY>

## Visual Settings

### Name Display (Rename):

Please display your first and last name on your screen by doing the following:

1. Click on the “Participant” icon



Hover over your name, click “More,” and then click “Rename.” The team chair should add “(VTC)” after their name, and team members should add “(VTM)” after their name to ensure they can be easily identified.



### Gallery View

All users must choose Gallery view to view all participants on a single screen by clicking “Gallery View” in the top-right corner.

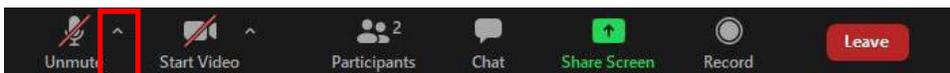
### **“Raise Hand” Feature**

When instructed by the team chair, participants will be asked to toggle the “raise hand” feature on-and-off. This can be accomplished by clicking “Participants” and then clicking “raise hand” or “lower hand.” The meeting host will be notified.

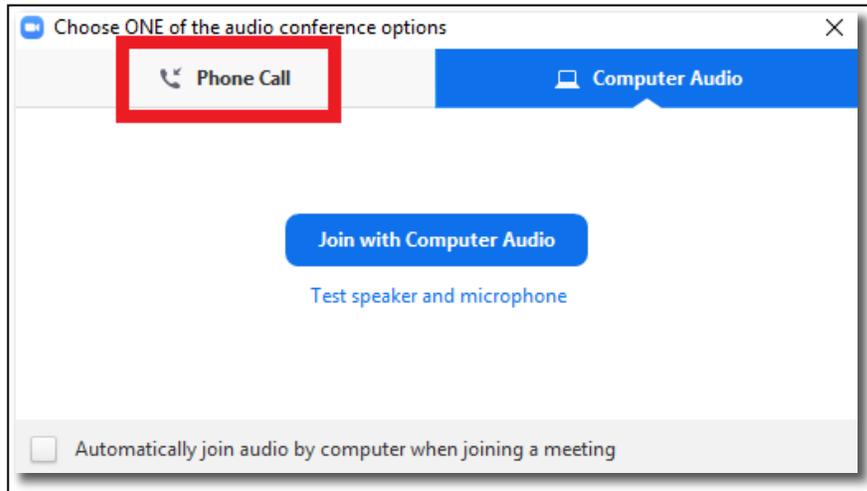
### **Joining Meeting Audio by Phone (ONLY IF EXPERIENCING TECHNICAL DIFFICULTIES)**

If you are experiencing technical difficulties with your computer audio, you may use your phone audio by doing the following:

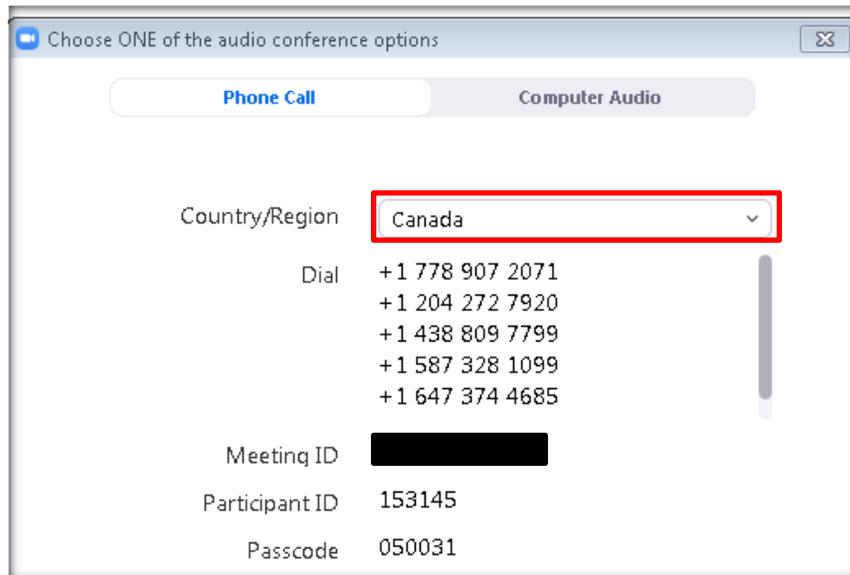
1. Join the Zoom meeting.
2. You will be prompted to join the audio automatically.
  - a. If this prompt does not appear or you close out of it, click “Join Audio” in the meeting controls.



3. Click the “Phone Call” tab



4. Select the country you are calling from in the flag drop-down menu.



5. Call one of the numbers provided.
6. Enter your meeting ID followed by #.
7. Enter your participant ID followed by #.

If you joined computer audio automatically, you may leave it and join by phone.

1. Click the arrow next to “Mute/Unmute.”



2. Click “Leave Computer Audio.”
3. Click “Join Audio.”

