



Committee on Institutes

Site Visit Guide for Administrators

Required Documents

It is necessary for the Site Visit Subcommittee to have a certain amount of information and data prior to the Site Visit itself. These data broaden the base of observation and understanding beyond the days of the actual visit itself. The Committee on Institutes (COI) is planning to use the Annual Reports furnished by the Institutes documents as a basis for this information wherever possible.

The following should be provided in advance:

- The Annual Report for the current academic year.
- Annual Reports for the two preceding years.
- A brief history of important events and changes which have taken place within the Institute since the last Site Visit.
- Copies of the By-laws and/or Constitution.
- An outline of current faculty procedures including:
 1. Appointment/re-appointment and retirement of faculty members.
 2. Training and Supervising Analyst Appointments (including Child/Adolescent Supervisors if they are not already on file with the ApsaA National Office).

The Committee also requires minutes of:

- Executive Committee/Board of Directors (Trustees) meetings during the past and current year in its deliberations upon its various functions.
- The Education Committee meetings during the past and current year and their deliberations upon various functions such as selection, curriculum review, progression of students, etc.
- Curriculum Committee.
- Child Analysis Committee.
- Psychoanalytic Clinic Committee.
- Any other subcommittee that you might consider useful for the Site Visit team to review.

The optimal date for sending data to the Subcommittee would be five or six weeks before the winter or spring meeting (depending upon a spring or fall site visit). It is not necessary for the Institute to wait until all of the Site Visit material is completed before transmitting it. In fact, we have found it mutually facilitating if the material is sent out in a number of batches as it becomes ready. Feel free to communicate as often as necessary with Site Visit members and the Committee on Institutes co-chairs.

Data copies should be sent directly to the following individuals: (*Do not send copies to the National Office. If you need mailing addresses, please ask the National Office*)

1. Each member of the Site Visit Subcommittee
2. Chair and Secretary of the Board on Professional Standards, Drs. Lee Ascherman and Elizabeth Brett and Incoming Chair and Secretary of BOPS, Drs. Dwarakanath Rao and Dionne Powell
3. Co-Chairs of COI, Drs. Ingrid Pisetsky and Gail Eisenberg

Meetings

It has been found to be most instructive if the visiting team has the opportunity during the Site Visit to meet with groups of individuals representative of various levels of participation and responsibility in the administration of the Institute. A meeting of the Chair of the Education Committee and/or Director/President of the Institute with the Chair of the Site Visit Subcommittee during the visit is often useful.

Typical Meeting Schedule:

- An initial dinner meeting with administrative officers and anyone else you wish to invite.
- Luncheon meeting(s) with a representative sample of candidates (typically five or six) at beginning, intermediate and advanced levels of training, along with five or six recent graduates. The size of these groups may vary, according to individual circumstances.
- A luncheon with several teachers whom the Site Visit Subcommittee may not otherwise meet, e.g., faculty who are not Training Analysts.
- A luncheon, dinner or breakfast with Institute and Society members not engaged in teaching.
- A wrap-up session between the Site Visit Subcommittee and appropriate representatives of the Institute administration. This allows the visitors to present a preliminary view of their findings and impressions, and provides opportunity for some questions to be asked and possible misconceptions to be clarified.
- Scheduled activities must end early enough on the date(s) of the visit to allow the Site Visit Subcommittee time for their final discussions and integration of data, and for the Chair to prepare his report for the next-day wrap-up session.

The visitors would like to attend the following:

- A meeting of the Executive Educational Committee to observe its usual manner of functioning in relation to the various areas of its activities -- curriculum review, student progression, admission, etc.
- Theoretical and clinical courses: a cross-section through the years of training, i.e., courses for students in different years of their studies, including Senior Candidates who have

completed formal courses. *It is most helpful if the site visitors can attend eight to ten classes (including continuous case seminars and child analysis seminars).*

Supervisory Session Observations

The Site Visit Subcommittee should observe supervision of beginning and advanced students doing clinical work in varying levels of difficulty. The committee would like to see supervision conducted by *both* more experienced and recently appointed supervisors. The number of supervisory sessions varies with the size of the candidate group and number of supervisors. However, 10 to 14 supervisory sessions is usually the optimal range.

- A brief (one to two pages at most) summary of each case is recommended and should be prepared by the candidate, prior to the visit. Such a summary will make it easier for the visitors to "tune in" on the material and will obviate the necessity for such summation during the supervisory hour.
- When possible, an interval of up to 30 minutes after each supervisory session should be scheduled, allowing time for conversations between supervisors and visitors. Impressions can be amplified or corrected in a collegial way, discouraging the formation of premature conclusions and insufficient exchange of information.
- Institute and Site Visitors may arrange for observations of Extension Division activities and/or Psychotherapy Training Programs. Depending upon the situation, it is often useful for Site Visitors to meet with leaders of the foundation, university departments with whom you have special relationships, or other relevant community groups.

Records

Records of students should be available for study, including some records of students who have posed difficult problems.

- In setting up the schedule, at least three one and one-half to two-hour blocks for examination of records should be arranged.
- The Site Visit team will divide into small groups for the perusal of records and the Chair of the site visit team may make specific requests for the records of certain students or certain categories of candidates.

Accommodations for Site Visitors

- The local Institute should make reservations which it thinks will be most convenient in accommodating the crowded schedules of the Subcommittee members. Currently, the room allotment for the site visitors' accommodations is \$250 per night (\$300 in NYC), and the Chair of the Subcommittee will need a suite where the Subcommittee can meet. Site

visitor hotel nights are budgeted from arrival on **Wednesday through check-out on Sunday**. *If a site visitor needs to arrive a day early or leave a day late then he/she must inform the National Office for approval prior to the start of the site visit.*

- The COI requests that the Institute arrange to pay for the block of hotel rooms on one master account using the Institute's tax-exempt number. In this way, hotel tax will not be charged. The APsA National Office will immediately reimburse the Institute for the total charges credited to the master account upon receipt of the bill.
- The site visitors are responsible for any incidental expenses (i.e. room service, minibar, etc.) they may incur individually. These expenses should be paid by the site visitor upon check-out. Only the hotel room should be charged to the master account.
- When making arrangements and considering meal plans, please bear in mind that the members of the Site Visit Subcommittee lose a substantial amount of income and are *not* reimbursed for meals.

Other Information

- If any individual wishes to talk confidentially with the Subcommittee, such a meeting can be arranged. The Institute administration should inform the Institute faculty and candidates, as well as Society members, of this point in advance of the visit. Anyone wishing to arrange such a meeting should contact the Site Visit Chair directly. Copies of this communication should be sent to:
 - The Site Visit Chair
 - Co-Chairs of Committee on Institutes.
- Please feel free to suggest anything else you consider will be useful to the Subcommittee in gaining a clear picture of your institute, its interests and philosophies.

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