GUIDE-09 PEER REVIEW TEAM CHAIR – TIPS AND RESPONSIBILITIES

Preamble

The Peer Review Team (PRT) carries out the preliminary and site reviews of an OTA & PTA education program and prepares a report which evaluates the program's evidence of compliance with the accreditation standards. The PRT Report is submitted to the Joint Accreditation Committee where the program's accreditation award is recommended. The PRT does not make a recommendation concerning the program's accreditation award, only about compliance with regards to individual accreditation criteria.

The PRT is comprised of four (4) members, one of which is appointed Chair by the OTA & PTA EAP:

- one occupational therapist representing the Canadian Association of Occupational Therapists (CAOT[1])
- one occupational therapist OTA/PTA educator
- one physiotherapist representing Physiotherapy Education Accreditation Canada (PEAC[1])
- one physiotherapist OTA/PTA educator

Eligibility Criteria

To be eligible to be the Chair of a PRT, the individual must meet the following criteria:

- Proficiency in the language of instruction of the program, including both oral and written communication
- Participation as a PRT member for at least one (1) previous site review
- Positive performance review(s) as completed by the program and other PRT members during previous review(s)

Responsibilities

In addition to the general PRT member responsibilities, the Chair of the PRT is responsible to:

- Seek information from the team members regarding their areas of interest and assign primary/secondary responsibilities for Standards review/report writing;
- Lead the preliminary review criterion by criterion during the videoconference, and facilitate a plan for the completion of the preliminary report;
- Collaboratively with the team, ensure the preliminary report is written in the correct format with the required content (review the Sample Preliminary Report);

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[1] See Terms of Reference for Peer Review Teams for eligibility (TOR-01)

- Submit the preliminary report to the Program Manager within two weeks of the preliminary review;
- Work with the program coordinator and OTA & PTA EAP staff to establish the schedule for the site review; consult with the program coordinator regarding any required changes to the schedule during the site review;
- Develop the agenda for, and lead, the PRT meeting on the Sunday before the site review;
- Guide/facilitate the team in the development of interview questions for each interview/focus group, based on the information received in the Self Study Report;
- Act as the official spokesperson for the PRT before and during the site review;
- Introduce the team to the education program faculty and staff on the first day and describe the role of the OTA & PTA EAP and the accreditation process;
- Ensure that the interviews are conducted with the appropriate tone and required content;
- Assist in the debrief after interviews and facilitate tracking of information criterion by criterion to ensure all gaps in evidence have been addressed, and all information in the Self Study Report has been verified.
- Guide/facilitate the writing of the Final PRT Report throughout the site review, and work towards consistency in writing styles/content between all team members;
- Lead the closing meeting with the program coordinator and outline the next steps prior to notification of the program's accreditation status;
- Determine how signatures will be obtained for the report once completed (circulated and electronically signed, blank signature page circulated during the review for signature etc.);
- Ensure the Final PRT Report is written (in collaboration with the team) and submitted to the Program Manager within two weeks of the site review; and
- Be available if necessary to provide clarification to the Joint Accreditation Committee when the accreditation award recommendation is being discussed.

Tips and Suggestions:

The following list of tips and suggestions has been generated from information gathered in post-accreditation review surveys completed by PRT members and Chairs, and education programs. They are presented to assist PRT Chairs in their role. It is recognized that every leader has his/her own unique leadership qualities; these suggestions are not intended to change leadership style or choices.

Before the preliminary review:

- Once the team members are introduced to each other via email by the Program Manager, contact the members either individually or as a group shortly afterwards (within a few weeks) to introduce yourself, to welcome them to the team, and to encourage communication.

- Become familiar with the preliminary review process, and the requirements for the preliminary report.
- Complete a detailed review of the Self Study Report, and make notes in order to prepare to lead the preliminary review during the scheduled teleconference.
- Review the PRT member responsibilities and the Chair responsibilities in the PRT Handbook.
- Contact the Program Manager at any time to ask questions, or to seek clarification or advice.

During the preliminary review teleconference:

- Assist less experienced team members in understanding the process through which the information in the Self Study Report is assessed and documented.

Assign each Standard a primary and secondary PRT member at the beginning of the review to take responsibility for notes/gap identification during the preliminary review – this will make your job collating the information into a report much easier after the teleconference is over.

Before the site review:

- Be clear about the PRT responsibilities/tasks between the preliminary review and the site review. Send reminder emails to the PRT members as the site review approaches to ensure they are getting those tasks done.
- Ask to receive the Final PRT Report for each Standard, completed by the primary PRT member for each Standard ahead of the site review so everyone has seen everyone else's identified gaps/questions. This also encourages the members to go through everything and take notes prior to the site review.
- Ensure you are very familiar with the Accreditation Standards and the accreditation process. For the newer members of the team, you will be their resource person.
- Review the PRT Handbook, ensure you are familiar with the format required for the Final PRT Report (See Samples provided). Be prepared to coach the PRT in writing the report to make it more consistent right from the beginning. Fixing it later takes more time.

During the site review:

- Look out for the comfort of the PRT members. Some Chairs have requested fruit plates/ snacks/appetizers for their working rooms. Some have made sure when they are on campus, that water is easily available in the PRT's workroom, and they take care of the little comfort details so the others don't worry about them. Feel free to ask the Program Manager to help arrange these things.
- Make arrangements to ensure the interviews end on time and the schedule is adhered to. Ask for a faculty member or administrative staff to act as a timekeeper. Have the

timekeeper provide a five minute warning, and assemble the next interviewees in the adjoining room (or online waiting room) for more efficient transitions.

- Speak clearly for the team – it is easier for the program to have one go-to person for the team, and takes the pressure off the other members having to answer question/make arrangements.
- Always be aware of the tone being used during interview by your team, and always model and encourage a non-judgmental and non-threatening environment throughout the visit. This is a collaborative opportunity for continuous quality improvement, not a punitive process.
- Ensure you are prepared to share the timeline and next steps in the accreditation process with the program during the closing meeting. The Program Manager can provide you with those dates.
- Be clear about the responsibilities after the interviews are complete. Report writing is collaborative, it is not the Chair's responsibility to write the report start to finish. Each Standard's primary PRT member is expected to complete the writing of that Standard, and submit to the Chair for compilation. Making that clear early in the process is essential. Many Chairs have found themselves writing or re-writing the report after the site review.
- Do not hesitate to contact the Program Manager by phone, text or email to problem solve should a situation or unexpected event[2] arise either before, during or after the site review about which you would like input.

After the site review:

- Don't hesitate to contact the education program by email on behalf of the team and thank them for their hospitality.
- Likely you will thank the other PRT members at the end of your last meeting, but a follow up email to them is always welcome.

Following the site review, the other PRT members and the education program faculty and staff will be asked to provide feedback re: your performance as PRT Chair. Feedback has suggested that knowing these questions in advance would help Chairs understand better what they will be evaluated on. The questions are available in the Appendix which follows.

Don't hesitate ever to ask questions of the OTA & PTA EAP staff – we are happy to help.

Guideline Number: GUIDE-09	
Date of last revision	Associated documents
February 2014	Program Handbook

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[2] *Examples of unexpected events may include: a PRT member becoming sick just before or during the site review; a member being unable to arrive onsite due to flight cancellation or delay; conflict between Peer Review Team members; conflict between the PRT/education program.*

February 2021	PRT Handbook
	GUIDE-05 Eligibility to become a PRT member
	TOR-01 Peer Review Teams

Appendix 1

Post Review Survey Questions
Chair Performance Evaluation

SurveyChoices:

Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	Unable to answer	Prefer not to answer

General Questions asked regarding all PRT members:

- They were knowledgeable about the accreditation process.
- They had a functional knowledge and understanding of the accreditation standards and evaluative criteria.
- They were prepared and well-versed in all components of the Program's Self-Study Report.
- They had thought about questions to ask based on the Self Study Report and other information submitted by the Program.
- They participated in effective and appropriate discussion of the standards and related evaluation criteria.
- They actively participated in team discussions throughout the visit.
- They demonstrated effective interpersonal skills throughout the review (e.g., worked as a team member, respected others' thoughts and opinions).
- They communicated in a professional, open, and engaging manner during the interviews.
- They wrote clear, succinct information about evidence related to the standards and evaluation criteria.

Specific Questions asked regarding the PRT Chair:

- They demonstrated a thorough knowledge and understanding of the accreditation standards and evaluative criteria.
- They facilitated an open, honest, and non-threatening atmosphere during the team's discussions.
- They requested pertinent additional information as needed to conduct the review.
- They raised relevant questions during the interviews.
- They demonstrated effective communication skills throughout the review (e.g., used active listening, created a non-threatening atmosphere).
- They assumed responsibility for the accreditation process (e.g., embraced their role as co-chair and the work to be done).

- They effectively and efficiently met all required deadlines.
- They were an effective team leader and mentor for PRT members.