Knock Knock. Who's There? A Call for Site Visit Standards

PRESENTERS:
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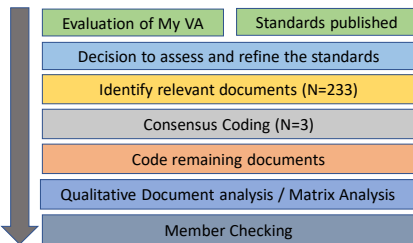
BACKGROUND:

In 2017, Michael Quinn Patton proposed site visit standards and encouraged others to see how they worked in a variety of contexts.

Also in 2017, the VA Collaborative Evaluation Center (VACE) conducted site visits as part of an evaluation of My VA Access , a Veterans Health Administration (VA) initiative to improve access to VA care.

When the co-authors learned of Patton's standards, they saw an opportunity to assess and refine Patton's standards.

METHODS

Evaluation of My VA	Standards published
Decision to assess and refine the standards	
Identify relevant documents (N=233)	
Consensus Coding (N=3)	
Code remaining documents	
Qualitative Document analysis / Matrix Analysis	
Member Checking	

RESULTS

- Applying the standards retrospectively was a fruitful process that reinforced Patton's standards and bore new standards.
- Five new standards emerged. (* in graphic) and four categories imerged
- The standards are cross cutting, and it is difficult to discuss them independently of one another.

CONCLUSIONS

- Site visit standards can be a helpful tool to ensure that site visits are used to their full potential.
- The VA is a unique environment for evaluation; these standards must be tested in a variety of environments to ensure that they apply across different contexts.

Evaluators can "shine their light" by applying and refining site visit standards.

Team
Interpersonal Competence
Cultural Humility
Evaluation Competence
Methodological Competence
Subject Matter Knowledge*
Site Specific Knowledge

Confounding
Neutrality
Credibility

Site Visit Standards

Planning
Project Design*
Resources*
Data Management*

Engagement
Team Engagement*
Sponsor Engagement
Site Engagement

Site Visit Standard Categories

A: Team Competencies and Knowledge
Standards in this category pertain to competencies and knowledge of the evaluation team, both individually and as a team unit. While interpersonal competence and cultural humility are necessary for all team members, the remaining competencies and knowledge may vary across members.

B. Planning
The planning category considers the different kinds of planning that must go into site visits. Planning is not a one-time event; it occurs throughout the site-visit process and is revisited on a regular basis, either formally or informally.

C. Engagement
The Engagement category looks at the communication within the team, between the team and the evaluation sponsor, and between the team and the sites being evaluated. Like planning, engagement evolves throughout the project and is not a one-time event.

D. Confounding Factors
Confounding factors are threats to the evaluators' (as individuals and as a team unit) ability to complete the work without bias and see what is really happening. Confounding factors can never be fully eliminated but there are ways to mitigate them.

FOR MORE INFORMATION:
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Patton reference:
Patton, M.Q. (2017). Revised site-visit standards: A quality-assurance framework. *New Directions for Evaluation, 156* https://doi.org/10.1002/ev.20267

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