

# Professional Standards Accreditation Site Visit Checklist

*Completed onsite by Professional Standards Compliance Coordinator*

## Administration

- Standard #1** – Observe agency facilities to ensure that inclusions are noticeable (e.g., signage, pictures, materials).
- Standard #2** – Documentation that training requirements have been met for the most recently hired staff and the most recent volunteers.
- Standard #2** – Training log for one staff member who has been at the agency for at least a year.
- Standard #2** – Training log for one volunteer who has been at the agency for at least a year.
- Standard #3** – Show recent audit and financial policies.
- Standard #3** – Show a sustainability plan with projected revenues and expenditures for the 36 months of operation following the submission of the application for accreditation.
- Standard #3** – Show a written succession plan for the Executive Director (or other agency leadership) position.
- Standard #3** – Show personnel policies.
- Standard #3** – Show job descriptions for all staff, intern, and volunteer positions.
- Standard #3** – Show procedures for staff that include instructions for responding to potential emergencies.
- Standard #3** – Show documentation that fire, tornado, bomb threat, and intruder drills have been conducted annually.
- Standard #4** – Show job descriptions for board members (*nonprofit agencies only*).
- Standard #4** – Show the written process for the selection of board members, including those who reflect the diversity of the communities served (*nonprofit agencies only*).
- Standard #4** – Show the written plan for board training (*nonprofit agencies only*).
- Standard #5** – Show where the state and federal regulations are posted.
- Standard #5** – Show the written policy/plan for obtaining a driving record from the Virginia Department of Motor Vehicles for those staff, volunteers, or interns who will be transporting clients.
- Standard #5** – Show the written ethical behavior policy.
- Standard #6** – Show the record retention policy.
- Standard #7** – Show operational procedures on client record/file security, maintenance, and access by individuals other than the client.
- Standard #7** – Show the written policies/procedures regarding how the agency assures compliance with applicable legal requirements regarding confidentiality.
- Standard #7** – Show the informed, written, and reasonably time-limited client release of information form.

- Standard #7** – Show the written policy to respond to subpoenas, court orders, and other legal processes.
- Standard #7** – Show the written policy addressing the security of home computers, laptops, smart phones, virtual private networks, cloud computing, hotline routing, etc. for any staff who telecommute, including how access is terminated for staff who leave the agency.

### **Crisis Intervention**

- Standard #10** – Show data report of crisis intervention services provided.
- Standard #11** – Show data report of accompaniments services requested and provided.
- Standard #12** – Observe the first aid supply kit.
- Standard #12** – Show data report of emergency shelter services requested and provided.

### **Advocacy**

- Standard #13** – Show data report of advocacy services requested and provided.
- Standard #14** – Show a current memorandum of understanding (MOU) with relevant community partner(s) (i.e., medical provider, justice system).
- Standard #14** – Show a physical or digital resource list with financial, healthcare, mental health, culturally specific, social service, and other resources.

### **Engagement**

- Standard #16** – Show data report of community engagement and outreach activities provided.
- Standard #17** – Show an example of training materials as they apply to community outreach.