

Accreditation Visiting Team Leader Certification

Part 1B

COE Summer Conference 2019 | Dr. Myra West | Dr. Gary Puckett

1

---

---

---

---

---

---

---

---

In this Session.....

- Leadership Discussion with Dr. Gary Puckett
- More about *MyCouncil*
- Conducting the Team Visit
- Being the Eyes and Ears of the Commission
- Leadership Responsibilities

2

---

---

---

---

---

---

---

---

Leadership Discussion

Dr. Gary Puckett, COE Executive Director

3

---

---

---

---

---

---

---

---

**Core Values.....Our Foundation**

- Trustworthiness
- Transparency
- Accountability
- Commitment
- Flexibility
- Innovation
- Collaboration

**Values**  
Principals guiding us toward our goals

4

---

---

---

---

---

---

---

---

**Discussion Questions**

- Can anyone be a leader?
- Can leadership be developed?
- What is the difference between working with volunteers and paid employees?
- Have you ever seen a politician where a leader is needed?
- Have you heard the term "opinion leader"?

5

---

---

---

---

---

---

---

---

**Leadership Origins**

- Gift
- Art
- Charisma
- Science
- Persona
- Influence
- Pedigree

The task of a leader is to get people from where they are to where they have not been.  
--Henry Kissinger

6

---

---

---

---

---

---

---

---

### Leadership Types

- Secular – Money - Employees
- Ideological - Passion - Volunteers

---

---

---

---

---

---

---

---

7

### Recognized Leaders



- Jim Jones
- Martin Luther King
- Abraham Lincoln
- Adolph Hitler
- Ronald Regan
- Osama Bin Laden
- Lee Iacocca
- Donald Trump
- Hillary Clinton
- Patricia Sue Summit

---

---

---

---

---

---

---

---

8

### Leadership Consequences

- Change or Status Quo
- Offended People or Happy People
- Growth or Decline
- Trust or Distrust
- Failure or Success

---

---

---

---

---

---

---

---

9

### Leadership Requirements

- Discernment
- Balanced Temperament
- Vision
- Influence
- Decidability
- Confidence
- Courage
- Consensus Builder
- Communication
- Wisdom
- Image
- Exemplary
- Experience
- Diplomacy

10

---

---

---

---

---

---

---

---

### Team Leader Responsibilities

- Lead as a positive and well-informed representative of COE
- Understand the COE Resources: Self-Study Manual, Handbook of Accreditation, Policies and Rules of the Commission, and *MyCouncil* software
- Assess correctly the school's readiness for a visit, and postpone if necessary
- Provide the school with helpful critiques of its self-study report and documentation

11

---

---

---

---

---

---

---

---

### Team Leader Responsibilities – *con't*

- Communicate the requirements of the Commission and team visit details to the school and team members
- Encourage collegiality, collaboration, and consensus with guidance
- Conduct a fair evaluation
- Complete an accurate and thoroughly informative team report for the Commission.

12

---

---

---

---

---

---

---

---



### Visiting Team Information in Team Report Software (TRS)

The screenshot shows a software interface with a sidebar on the left containing various menu items like 'Institutional Advisory Committee', 'Occupational Advisory Committee', 'Cables Received', 'Finance Statements', 'Per Student Accreditation Plan', 'Webroom', 'Inquiries', 'Accommodations', 'Self Study', 'Conditions and Standards', 'Programs', 'Other Items', and 'Team Member Correspondence'. The main content area is titled 'Team Member Correspondence' and contains a list of three questions with 'Yes' and 'No' radio buttons. A red callout box with white text says: 'All of the team's information may be found in the team report software'.

16

---

---

---

---

---

---

---

---

---

---

### Communication with Team Members

- Welcome Email/Letter to Team Members
  - Note any special considerations
    - Weather, activities, ask about food allergies, etc.
- Team Schedule
  - Remember to schedule time to speak to night schools students and staff, if applicable
  - Reminder: Team members should not make travel or lodging arrangements outside of the scheduled timeline without first discussing them with the leader and COE staff
  - Remember to visit ALL COE-accredited campuses. And plan to visit at least one clinical and/or externship site
- Expense Receipts

17

---

---

---

---

---

---

---

---

---

---

<b>Monday</b>	Team Arrives at Hotel First Team Meeting Welcome Reception by Institution	  <div style="border: 1px solid gray; padding: 5px; display: inline-block;">Sample Schedule</div>
<b>Tuesday</b>	Team arrives at Institution Meet w/CAO & Tour and Review Programs Standard 2 Lunch - Working Return to Hotel Dinner w/ Institutional selected staff	
<b>Wednesday</b>	Review Program Findings Review All Standards & Conditions Lunch - working Recap Standards & Conditions Draft Team Report	
<b>Thursday</b>	Collect Data & Complete Team Report Run Audit on TRS Team Leader w/CAO – Institutional Response Complete Evaluations & Reports Oral Team Report – Presentation to Institution	

18

---

---

---

---

---

---

---

---

---

---

### Initial Meeting with the Visiting Team

- Introductions
- Discuss assignments
- Review team schedule
- Generally review conditions, standards and criteria for questions, etc.
- Verify that appropriate version of check sheets are being used (based on type of institution and edition)

---

---

---

---

---

---

---

---

19

### Welcome Event

- Team Leader Introductory Remarks
  - “Assuring Quality and Integrity in Career and Technical Education”
  - COE Scope, Demographics and Student Outcomes
  - Core Values
- Introduction of Team Members
  - Team members introduce themselves:
    - Name
    - Occupation
    - City and state/county
    - Standards and programs they are evaluating

---

---

---

---

---

---

---

---

20

### DAY 2 – Programs Review

- CAO addresses the visiting team
- School tour
- Assistant team leader assumes the responsibility for the review of Standard 2 (Programs)
- Individual program check sheets
- Make plans to visit night classes (if held)
- Schedule visits to work-based sites (Remember ALL COE-approved sites must be visited; e.g., clinical, internship, apprenticeship, co-op, etc.)
- Review the progress of the evaluation of programs
- Beware of compound statements within the criteria (often separated by commas)

---

---

---

---

---

---

---

---

21

**DAY 3 – Standards Review** (STANDARDS CHECKSHEETS 1-10)

- Here are all the written plans:
  - Work-based Activities Training
  - Job Placement/Follow-up
  - Strategic Plan
  - Operation and Maintenance
  - Default Management
  - Effectiveness of Student Services
  - Effectiveness of Student Retention
  - Placement Services
  - Physical Facilities and Technical Infrastructure
  - Media Services

**REMEMBER:**  
ALL plans must be  
 evaluated AND in  
 use

---

---

---

---

---

---

---

---

22

**DAY 3 – End of Day**

- Review all programs and standards
- Final draft of programs
- First draft of standards
- Review of all standards and FNCs, suggestions, and/or commendations
- Schedule a meeting with the CAO to ensure that missing documentation the team could not locate has not been overlooked

---

---

---

---

---

---

---


---

23

**DAY 4**

- Finalize all standards
- Team Report - DRAFT
  - Introduction to the Team Report
  - Ensure that all information has been entered into the TRS
  - Run the TRS audit
  - Finalize draft of oral team report
  - Meet with the CAO regarding the institutional response format (provided by COE) to address team’s findings
  - Remember, “DOCUMENTATION, NOT DISCOURSE”

**IMPORTANT:**  
 Use the introduction to  
 detail any unusual  
 situations or concerns that  
 could not otherwise be  
 captured in the team  
 report




---

---

---

---

---

---

---

---

24



### Policies and Procedures

- Admissions
- Transfer of Students Between Programs
- Transfer of Students from Other Institutions
- Refunds
- Emergency Purchase/Repair
- Performance Evaluations
- Employee Orientation
- Grievance Policies/Procedures
- Organizational Chart
- Access to Student Records

---

---

---

---

---

---

---

---

25

### Top Findings of Non-Compliance

- COE List of Approved Programs (Conditions)
- The COE List of Approved Programs does not align with programs that the institution is offering
  - Write a finding of non-compliance (FNC) in Conditions #13; See handout regarding Program Inconsistencies
- Employer Verification Forms (Standard 2)
  - Outdated forms, forms not signed, or not signed by person in a position to make hiring decisions
- Advisory Committee Meetings
  - Institutional Advisory Committee (Standard 1)
- Occupational Advisory Committee (Standard 2)
- Follow-up Plan for Completion, Placement, and Licensure (Standard 3)
- Strategic Plan (Standard 4)
- Beware of compound statements within the criteria (often separated by commas)

---

---

---

---

---

---

---

---

26

### Top Findings of Non-Compliance

- Health and Safety Plan (Standard 6)
  - Institution does not have a plan that includes all the required elements found on the Standard 6 check sheet
- Annual evaluation of institutional employees (Standard 8)
- Plan for Professional Growth (Standard 8)
- Plan for Evaluation of Student Personnel Services (Standard 10)
- Plan for Placement Service (Standard 10)
  - Institution does not have a plan, or the plan does not include all required elements found on the Standard 10 check sheet

---

---

---

---

---

---

---

---

27

### Suggestions, Recommendations, and Evaluations

Report Information

Using Team Information

Team Leader

Team Leader Role

Feedback/Visit/Workshop

Using Team Evaluation of the Institution's Self-Study

**Evaluation by the Team Leader**

Introduction to the Team Report

Team Report

Feedback

**Evaluation by the Team Leader**

Save Report Data

1. How could the office of the Executive Director of the Commission on Occupational Education better plan for the team visit?
2. How could the institution have improved its arrangements for the team visit?
3. Is there anyone on the campus you wished that we could add to our prospective list of visiting team personnel? (Include suggestions made by members of your team.)
4. Please give a brief appraisal of each member of your team. Would you recommend any of them to serve as a team leader or not serve on a future team? Give strong and weak points.

Save Report Data

28

---

---

---

---

---

---

---

---

---

---

### Final Tasks

Team's Evaluation of the Institution's Self-Study	Personnel Interview data in TRS	Erase all computer files on the institution's computers
Shred all hand written notes and material	Review Expense Voucher for consistency	When the team leaves, contact with the institution ends

29

---

---

---

---

---

---

---

---

---

---

### Leadership Responsibilities

- Professional Conduct
- Avoid fraternization with institutional staff
- Avoid using this comment: "At my school, we....."
- Stay on task and keep the process moving
- Contact COE staff, if needed

30

---

---

---

---

---

---

---

---

---

---

Reminders

- The Self-Study Report must be completed and emailed to the Team Leader before the Preliminary Visit
- Has the on-site administrator or other full-time employee at the main campus attended required workshop(s) within 6-18 months prior to hosting the accreditation visiting team.
- Consultants may not serve in the role of accreditation liaisons for an institution and should not contact the Council office for information on behalf of the institution.

31

---

---

---

---

---

---

---

---

Reminders

- Exhibits should be presented in electronic folders arranged in the exact order as the criteria on the COE Check Sheets
- Be familiar with the number of exhibits that should be provided for each criteria
- There should be exhibits for the conditions, for each standard, and for each occupational program

32

---

---

---

---

---

---

---

---

Reminders

- Team members will seek to verify that the Self-Study Report is an accurate description of activities taking place at the institution
- The Composite is no longer required
- Employer Verification Forms, financials and the Financial Questionnaire are no longer required in the Self-Study Report
- Plans, policies and procedures must be evaluated and in use

33

---

---

---

---

---

---

---

---

### Workshop That You Can Use to Stay Up-to-Date

- Self-Study, Parts 1 and 2
- Occupational Advisory Committees: Moving from Compliance to Operational Excellence
- Annual Report for Beginners: The Annual Reports Reporting Completion, Placement, and Licensure Data
- Improving Student Achievement (Accreditation Maintenance Track)
- Annual Meeting: November 13-15, 2019 in Reno, NV

34

---

---

---

---

---

---

---

---

## THANK YOU!

NEXT REQUIRED WORKSHOP...

Part 2 - Team Leader/Team Member Certification – Writing Findings of Non-Compliance

35

---

---

---

---

---

---

---

---