

Accreditation Visiting Team Leader Certification

Part 1B


COE Summer Conference 2020 | Myra West | Kim Ziebarth

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In this Session.....

- Conducting the Team Visit
- Team Report
- Being the Eyes and Ears of the Commission
- Leadership Responsibilities

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Monday	Team Arrives at Hotel First Team Meeting Welcome Reception by Institution	 <div data-bbox="1065 478 1300 596" style="border: 1px solid gray; padding: 5px; text-align: center;"> <p>Sample Schedule</p> </div>
Tuesday	Team arrives at Institution Meet w/CAO & Tour and Review Programs Standard 2 Lunch - Working Return to Hotel Dinner w/ Institutional selected staff	
Wednesday	Review Program Findings Review All Standards & Conditions Lunch - working Recap Standards & Conditions Draft Team Report	
Thursday	Collect Data & Complete Team Report Run Audit on TRS Team Leader w/CAO – Institutional Response Complete Evaluations & Reports Oral Team Report – Presentation to Institution	

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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)

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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

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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)

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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

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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

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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

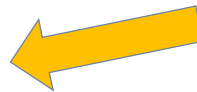
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DAY 4

- 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



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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)

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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

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Suggestions, Recommendations, and Evaluations

- Institution Information
- Visiting Team Information
- Team Leader
- Team Leader Notes
- Preliminary Visit Worksheet
- Visiting Team Evaluation of the Institution's Self Study Report
- Evaluation by the Team Leader
- Introduction to the Team Report
- Team Report

← Previous

Evaluation by the Team Leader

1. How could the office of the Executive Director of the Commission of the Council 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 visited that we could add to our prospective list of visiting team personnel? (Include suggestions made by members of your team.)
4. Please give a frank 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.

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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**

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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

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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.

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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

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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

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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 Report: Reporting Completion, Placement, and Licensure Data

Improving Student Achievement (Accreditation Maintenance Track)

Annual Meeting:
November 13-15, 2019
in Reno, NV

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THANK YOU!

NEXT REQUIRED WORKSHOP....

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

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