Accreditation Team Leader Certification

Part 1A
2021 COE Annual Meeting

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In this Session……..

- Types of Visits and COE Publications
- Team Leader Responsibilities and Duties
- Getting Started on MyCouncil
- Preliminary Visits (General Information)
- Required Documents to Complete
- Potential Show-Stoppers for a Visit
Types of Visits

- Candidate Visits
- Initial Accreditation Visits
- Reaffirmation Visits
- Unannounced Visits
- Focused Visits
- Substantive Change Visits

Visits for the remainder of 2021 could be:
- In Person
- Virtual
- Hybrid

Establishing a Strong Knowledge Base of COE Policy

Prior to leading a team, have a good working knowledge of policy:
- Handbook of Accreditation
- Policies and Rules of the Commission
- Current version of the check sheets

IMPORTANT: Stay abreast of policy changes.
Purpose of the Accreditation Visit

Determine if the institution is in compliance with the policies, standards and conditions of accreditation of the Commission.

Criteria for Serving as a Team Leader

- Must have demonstrated competence in evaluation, leadership, and written composition.
- Must have served as a member of at least two teams.
- Must be recommended to serve as future team leader by the leader of a team on which he/she has been a member.
- Must agree to conduct prescribed activities within the identified time frame.
- Must attend a workshop for team leaders, which includes the evaluation of programs offered via traditional delivery and distance education, prior to becoming a team leader and must attend a team leader workshop at least once every three years.
Desired Characteristics of a Team Leader

★ Effective Communication Skills
★ Relationship Builder
★ Leadership Skills
★ Organized
★ Good Judgement

Job Description of the Team Leader

- Along with COE staff, assist school to prepare for visit
- Review and approve the final draft of the Self-Study Report 60 days prior to the visit
- Conduct the preliminary visit
- Complete required MyCouncil database information
- Provide guidance and information to the team prior to the visit
- Lead the accreditation visiting team and coordinate team report effort
- Maintain communication with COE staff, as needed
- Submit final team report
Team Leader Responsibilities

- Lead as a positive and well-informed representative of COE
- 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

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.
Learning from experience

What is one thing that you have learned from being a team leader?

What is the greatest challenge you face as a team leader?

First Steps--Using My Council

Go to Council on Occupational Education website. www.council.org

Click on my council in upper right hand corner.

Update your biodata by clicking on the User icon and click on your name. Update your BioData information.
Email Invitation from COE Staff

Conflict of Interest form

- Respond with a YES or NO to the COE invitation to serve as a team leader within the number of days indicated in the letter
- If YES, complete and submit the Conflict of Interest Statement to COE immediately

Log into your MyCouncil Account. Click on the Schools Icon. You now have access! Find the School you will be visiting.
After clicking on the school’s name, information about the school will appear. *(Team leaders need to check information for accuracy.)*

More School Information—FTE and Campuses

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<td>Extension</td>
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<td>128503 - Tennessee College of Applied Technology - Livingston - Richmond Instructional Service Center</td>
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<td>128504 - Tennessee College of Applied Technology - Livingston - Jackson County Instructional Service Center</td>
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Check the COE Approved Programs. Make sure that self-study, website, recruitment materials, and Catalog match the approved program list.

Access the Team Report Software
Tips for leading a successful team!

Since you need the *self study report 60 days prior to the scheduled visit* reach out to the school approximately 90 days before the visit (if you have not already heard from the school).

The team leader provides the school with technical assistance only, according to the guidelines outlines in the COE manuals.

Team leader should **NEVER** prescribe a solution to a deficiency, nor make corrections of any kind on behalf of the school at any time throughout the process.

Team leader should not have a my way approach--the only requirements that the school must meet are the standards set forth by the Council.
Preliminary Visit Tasks

- Review and Approve the Final Draft of the Self-Study 60 (calendar) days prior to visit.
- Schedule visit at least 30-45 days prior to scheduled date of accreditation visit
- **Be prepared to spend a minimum of a full work day at the institution**
- Once on the visit:
  - Tour facilities with COE criteria in mind
  - Review documents related to team visit
  - Examine financial statements
  - Discuss workroom setup
  - Create a schedule and an agenda for accreditation visit

Preliminary Visit
What should you ask the school to have prepared for you?

- Electronic folders for each standard (including conditions)
- Within each standard folder there should be individual folders for each criteria
- Within each criteria folder the school should provide documentation to validate the compliance with the criteria
- The documentation will be for the most recent completed/current year
- From cycle to cycle lookback materials: all advisory materials both occupational and institutional, all plans, records of student refunds, grievances, audits/financial reports, and 3 years of Marketing.
IMPORTANT

Beginning January 1, 2019

The follow documentation must be kept on file from one accreditation visit to the next. All of this documentation will be prepared as exhibits for the visiting team:

- Institutional advisory board agendas and minutes
- Occupational advisory board agendas and minutes
- Strategic plan and all other plans
- Records of Student Refunds
- Grievances
- Default Management Plans
- Financial Reports
- Copies of promotional and advertising materials (must be kept for 3 years)

Potential Show Stoppers

- An onsite administrator or full-time employee at the main campus has not attended the Commission self-study and annual report sessions 6-18 months prior to the team visit
- Institution did not submit a complete, well-organized self-study to team leader 60 days before accreditation visit (NOT a draft)
- Institution did not submit an original self-study document to the team/commission (plagiarism)
- Overall, the institution is ill-prepared to host a visit an accreditation visit, and provides insufficient documentation or exhibits during the preliminary visit

- In any such case, contact COE team visit coordinator immediately
Communication with Team Members

- Welcome Email/Letter to Team Members
  - Note any special considerations
    - Weather, activities, ask about food allergies, etc.
- Discuss and Coordinate Team Travel
- 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
Next Steps
Update Team Report Software

Forms
- Institution Information
- Getting Started
- Visiting Team Information
- Team Leader
- Team Report
- Final Affirmation

Institution Information

Confirm Campus Information

Click the ‘School Info’ link to review campus information in the school's MyCouncil file.

All Campus information including its addresses are accurate at the time of the Team Visit. REMINDER: If institution has changed its name or street address without having notified the Council, a Finding of Non-Compliance must be written under the Conditions folder for failure to notify the Council of a substantive change in a timely manner.

- Yes
- No

Submit Section  Save Draft  Cancel

Next Step
Visiting Team Information

General Information

Visiting Team Information - General Information

1. Institution Name
   First Coast Technical College

2. Team Leader Name
   Myra West

3. Dates of Team Visit
   10/04/2021

4. Suggested Means of Transportation to Institution

Submit Section  Save Draft  Cancel
Important Information for Team Members
Next Step
Team Leader Information
Institutional Advisory Committee

Digital accreditation files have been reviewed and the following has been confirmed:

1. Institutional advisory committee is in place *
   - Yes
   - No

2. Minutes exist that document one meeting has been held annually OR twice annually, if serving in an occupational advisory capacity *
   - Yes
   - No

Submit Section  Save Draft  Cancel

Occupational Advisory Committee

Digital files have been reviewed and the following has been confirmed:

1. Spot check occupational advisory committees are in place for each program taught by the institution and comply with all requirements for membership.
   - Yes
   - No

2. Spot checks ensure no fewer than three months separate each official committee meeting.
   - Yes
   - No

3. Spot check evidence that documented two meetings have been held each year.
   - Yes
   - No

4. Spot check curriculum for each program has been reviewed.
   - Yes
   - No

5. Spot check roster of each occupational advisory committee designating “official members” with their name, position, employer, and occupational title. OCR committees should have this roster.
   - Yes
   - No

6. Spot check websites and digital publications for alignment between their CCH Approved Programs List and the programs on a local.
   - Yes
   - No

7. Spot check websites and digital publications for alignment between CCH approved locations and those they are linked.
   - Yes
   - No

8. Spot check an occupational advisory committee has completed the required survey of standards. Document receipt from website must be provided as evidence that survey of standards was completed.
   - Yes
   - No

9. Spot check for completion of Employer Program Verification Form for all programs.
   - Yes
   - No
### Preliminary Visit Worksheet - Copies Reviewed

Copies of the following have been obtained for review (Online/Hardcopy):

- **School Catalog**
  - Yes
  - No
  - N/A

- **Student Handbook**
  - Yes
  - No
  - N/A

- **Staff Handbook**
  - Yes
  - No
  - N/A

- **Brochures**
  - Yes
  - No
  - N/A

### Preliminary Visit Worksheet - Financial Statements

Financial statements have been examined (non-public and registered apprenticeship institutions), and the following has been confirmed:

1. Non-public institutions seeking initial accreditation must submit audited financial statements for the two most recent fiscal years at least 60 days prior to hosting an initial accreditation visiting team. The first of those two years may be the audited financial statement submitted with the institution's candidate application, and the second audited financial statement must represent activity while the institution is in candidate status. Both audited financial statements must demonstrate compliance with the Commission's financial stability requirements as stated in Standard 7-Financial Resources.
   - Yes
   - No
   - N/A

2. Non-public institutions: COE financial questionnaire for the most recent fiscal year is available/will be available for the team visit.
   - Yes
   - No
   - N/A
Schedule

Preliminary Visit Worksheet - Schedule

The following team requirement has been discussed with the institution's chief administrative officer:

1. A tentative schedule has been developed and a copy has been given to the institution's chief administrative officer.

   * Allowances are made for the institution's hours of operation, class scheduling, and distance between campuses, if applicable.

   - [ ] Yes
   - [x] No

Accommodations

Preliminary Visit Worksheet - Accommodations

The following accommodations have been made for the team:

1. [ ] Hotel billing - preferably direct bill to institution
   - [ ] Yes
   - [ ] No

2. [ ] Meals - breakfasts, lunches, dinners
   - [ ] Yes
   - [ ] No
Self Study

Preliminary Visit Worksheet - Self Study

1. Self-study report has been examined and the team leader has discussed the final details of the final copy. The team leader reminds the institution to submit the report to the team members and to the appropriate COE staff members no later than 20 days prior to the accreditation team visit.

   - Yes
   - No

2. Spot check documentation to ensure that digital exhibit preparation is on track

   - Yes
   - No

Submit Section  Save Draft  Cancel
Just the beginning. . .more to come!

NEXT REQUIRED WORKSHOPS....

- Part 1 B - Accreditation Visiting Team Leader Certification
- Part 2 - Team Leader/Team Member Certification – Writing Findings of Non-Compliance