Council on Occupational Education
Virtual Training
Team Member Certification
2021 Virtual Annual Conference

Presented by:
Dr. Tangela Purifoy
Lauren Davis

Topics to be Covered

The Responsibilities of Team Members
Preparation for the Team Visit
The Team Visit (Initial and Reaffirmation)
Evaluation Criteria—Check sheets and Interviews
Team Reporting Software (Initial and Reaffirmation)
Team Member Finances
Status of Virtual Visits will be discussed in Accreditation Team Leader and Member Certification, Part 2

Primary Responsibility of Visiting Teams

To determine if the institution is in compliance with the Policies, Rules, Standards, and Conditions of the Commission.

Accreditation status is granted only by the Commission—not the Visiting Team.

Remember: The integrity of COE’s accreditation is contingent on your review of the institution.
Initial and Reaffirmation Team Visits

- Site Visits are typically 3 to 4 days for a visit depending on the number of programs and campuses
- Size of the team depends on the number of programs and campuses

Candidate and Substantive Team Members

- Site Visits are typically 2 days
- Usually a two-person team
- Check Sheets are provided by Dr. Alex Wittig
- After the site visit, the team report is scanned and emailed back to the COE office
Announced and Unannounced Focused Visits

**Announced Focused Visits**
- Result of a Commission decision
- Communication with institution (date, hotel, transportation)
- Check Sheets are created and focused on FNC
- Typically, a 1 ½ to 2-day visit at the institution
- Check Sheets are emailed back to visit coordinator

**Unannounced Focused Visits**
- Confidential
- Check Sheets are created
- Team Leader arranges agenda (hotel, airport, etc)
- Typically, a 1-day visit at the institution
- Letter from Dr. Puckett presented to Director
- Check Sheets are emailed back to visit coordinator

Team Member Certification

All persons interested in participating in Commission team visits must be certified to do so.
- Attendance at Commission-sponsored workshops
  - Virtual Workshops
  - Summer Conference and Annual Meeting
- Two workshops Required for Certification
  - Must be renewed every three years
Team Members

Must have an active account in the COE MyCouncil accreditation management system.
Review your account to ensure contact information is updated.

MyCouncil Account

For assistance to activate your MyCouncil account: Amanda Lough (ext. 100)
Amanda.lough@council.org
MyCouncil Password

Create your MyCouncil password.

To change your password, go to “My Profile” after you log into MyCouncil.

Passwords are case sensitive. Secure passwords contain upper and lowercase as well as numbers.

Complete your BioData

Contact: Amanda Lough, COE
Amanda.Lough@council.org
Ext. 100

Be sure to complete the section on work experience and if you are bilingual.
Team Member Selection

Team Members as Evaluators

Evaluators not Inspectors.

Approach should be objective and not biased or affected by practices at the home institutions of the team members or by personal prejudices.

Respect the confidentiality of the Self-Study Report and all other institutional documents.

Team members must not discuss the team visit or any findings of non-compliance with anyone other than team members or a Commission representative present during the site visit, or afterwards.
Your Commitment to Serving on the Team Visit

Be sure you can attend the entire visit—if you are not able stay the entire scheduled date, you must discuss with COE staff.

Review the Handbooks
◦ Policies and Rules of the Commission
◦ Handbook of Accreditation

Read the Self-Study Report
Visit the institution’s webpage
Review the Standards

Publications Available On-line
www.council.org

Check Sheets and Manuals
Publications Available On-line
Team Report Software (MyCouncil)

**New Team Report Software**

The HELP tab is currently unavailable in the team report software. Worksheets and Manuals are available on the COE website. Amanda will inform when the team report is available. You should attempt to log in and view the information from the team leader.

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**Step 1:**

You will receive an email or call from COE staff asking you to participate in the team visit.

**Respond Quickly**
Step 2:

Complete the Conflict of Interest Statement and return by email to Amanda.

Team Report--Applications

<table>
<thead>
<tr>
<th>School</th>
<th>Status</th>
<th>Application</th>
<th>Edition</th>
<th>Reference #</th>
</tr>
</thead>
<tbody>
<tr>
<td>395000-00 North Georgia Nursing Academy</td>
<td>Not Submitted</td>
<td>Team Report</td>
<td>2021</td>
<td>02-0207</td>
</tr>
</tbody>
</table>
Visiting Team Information

Includes:
- Airport information
- Transportation to institution

Team Information

Team Assignments
Team Member Contact Information
Preparation for the Team Visit

Receive Materials from Institution—at least two weeks prior to the visit—No hard copies will be sent to team members.
- Self-Study Report
- Catalogs
- Other Materials—Student Handbook, Faculty Directory, Miscellaneous Items
- Familiarize yourself with the institution’s website
- **Do not book your flight until you receive confirmation of the team visit from your team leader**

Before Arriving at the Campus
- Read the entire Self-Study Report and any other information from institution
- The Handbook of Accreditation
- Familiarize yourself with the Team Reporting Software and Check sheets
- Make sure you can log in to MyCouncil prior to arriving at the institution

Keep in Mind...
Digital Exhibits are Required

- Digital Exhibits show the institution’s compliance to the Conditions and Standards
- Specific and detailed
- At least one document per criterion
- Watch for commas, conjunctions
- What year should the institution use?

Evaluation of Compliance

At the time of the site visit, the institution is providing a snapshot in time; therefore, no changes, modifications, additions, and deletions can be made to the institution’s documentation.

The team will allow the institution a reasonable time to retrieve existing documentation (determined by the team leader)
Evaluation of Compliance

Check Sheet Basics

◦ Check sheets are used to provide consistency in the evaluation process.

◦ You will have check sheets for the Standards you are reviewing AND the individual programs you are reviewing. There are also worksheets to complete e.g. Refund Policy Worksheet, Confirming Compliance with Recruiting/Advertisement Requirements, Criteria for Publications.

◦ Check sheets are provided for printing in hard copy to use as worksheets through the COE Team Report Software or on the Council website (www.council.org).

◦ Data can either be entered directly into the software, OR it can be collected on check sheet hard copies, and then entered into the team report software.

Documents gathered to write the Report should become the exhibits reviewed by the visiting team.

The following documentation must be kept on file from one accreditation team visit until the next. All documents will be prepared as exhibits.

- Institutional Advisory Agendas and Minutes
- Occupational Advisory Agendas and Minutes
- Strategic Plan and All Other Plans
- Refunds
- Grievances
- Default Management Plans
- Financial Reports
- Employer Verification Forms

A record or copy of all promotional and advertising material must be kept on file for 3 years.

For all other types of documentation not listed above, the institution should provide one year of documentation in their exhibit materials. It is at the team’s discretion to ask for additional documentation.
Remember all Plans....

Must be evaluated and in use

Important Definition:
What Is A Program?

**Occupational Education Program**—An education program designed to provide a sequence of educational and skill development experiences that lead to workplace competencies. (Such programs offered by Commission accredited institutions are designed to prepare individuals for job entry and/or career advancement.) An “occupational program” is one that prepares a student for employment or job advancement. **Occupational programs can be any length**, from a 40-hour phlebotomy program to a 2,000-hour dental hygiene program. The term “short program” has no meaning with COE. Whether the school calls it a “course” or a “program”, if the instruction imparts job knowledge and skills and prepares the student for employment or job advancement, it is an “occupational program” in the eyes of the Council.
Important Definitions:

**Instructional Delivery Methods**
- **DISTANCE EDUCATION**: An education delivery method in which instruction occurs when students and instructors are not in the same place; may be synchronous or asynchronous; may employ correspondence study, audio, video or computer technologies.
- **Traditional Programs**: all bricks and mortar
- **Hybrid Programs**: less than 50% of coursework available via distance
- **Distance Education Programs**: 50% or more of required instruction available via distance education delivery methods

*An institution must utilize a campus-based instructional delivery system with at least 50% of the institution’s total FTE being derived from enrollments in traditional (bricks and mortar) programs.

Important Definitions:

**Work-Based Activities:**
- Structured learning activities conducted in supervised work settings external to the institution or a program, or in a setting that involves the public (for example: clients who are served by the institution in cosmetology clinical or automotive technology settings) that are components of educational programs (e.g., externships, internships, clinical experiences, industrial cooperative education, and similar activities). These activities must be planned with at least two objectives:
  - To provide students with the opportunity to develop and apply a “real-world” work experience using the knowledge and skills they attained in their program of study; and
  - To provide the institution with objective input from potential employers or customers of program graduates.
Important Reminders:

❖ Guidelines for Reporting Secondary Programs: *Important change to this policy. No longer are institutions required to include secondary students and programs in the Self-Study Report (and FTE calculation and completion rate data collection). The Council gives the institution the option to include secondary programs in the Self-Study Report.

❖ Consultants may not serve in the role of accreditation liaisons for an institution before, during, and after the team visit.

Documenting Course Prep Time for Federal Credit Hours

❖ Since course prep time is included in the calculation of federal or financial aid credit hours, institutions **must** have written policies and procedures for determining the amount of student work to be done outside of class. Assignments for homework or course prep work **must** identify specific learning objectives for each course as well as an approximate time required for completion. Furthermore, the work **must** be evaluated, graded and weighted appropriately in the determination of the final grade for each course. Institutions will be required to maintain documentation that course prep work assignments are completed and considered in determining the final course grade.

❖ If current academic credit hours already include at least 7.5 clock hours of course prep work for each academic semester credit hour, or at least 5 clock hours of course prep work for each academic quarter credit hour, institutions must nonetheless document the nature, objectives, and time requirements for the homework, research or other unsupervised learning activities required for each course.
Vocational English-As-A-Second-Language Programs

A Vocational English-As-A-Second-Language (ESL) Program is a stand-alone program that is limited to persons already possessing occupational competencies who would be employable if they could demonstrate adequate English language skills. The program consists solely of English as a second language courses and must meet the following requirements:

a. The program must meet the objectives and criteria required of all COE-approved educational programs.
b. The institution must admit only students who need instruction in English to be able to use the knowledge and skills that they already possess in order to obtain employment.
c. The institution must demonstrate that students enrolled in the ESL program possess job skills, as evidenced by documentation such as credentials, test scores, job experience, or verification of skill competencies by a third party.
d. The institution accepts the responsibility for placement assistance upon graduation in compliance with COE placement requirements.
e. The institution must submit student achievement data to verify completion rates, placement rates, and if applicable, licensure exam pass rates, for all students enrolled in Vocational ESL programs.

Vocational English-As-A-Second-Language Programs must be included on the list of programs.

Conversely, 'Avocational' English-As-A-Second-Language programs (or 'stand alone' ESL programs) are those English language programs that enroll members of the community who are interested in learning the language for purposes other than seeking employment. Avocational English-As-A-Second-Language Programs are not included in the Council's scope of accreditation and are not included on the list of programs. Institutions offering any avocational programs must specify that the programs are not accredited by the Council and do not qualify for Title IV financial aid assistance in appropriate publications and brochures.
Step 3: Making Travel Arrangements

- Receive information from the team leader
  - Schedule
  - Transportation
  - Time of the Initial and Final Conference
  - Team Roster

- Team Members must make their own travel arrangements.
  - If you drive or need special accommodations, contact the COE team visit coordinator (Elizabeth) to discuss. The cost of driving must be cheaper or equal to the cost of the airline ticket.

- Team Members should notify the Chief Administrative Officer, Team Leader and COE of their plans.

- **DO NOT** make travel arrangements until you receive the Visiting Team Information from the team leader.

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Step 4:

Day One of Team Visit

Travel Day
Initial Team Meeting
Overview of Preliminary Visit
Social Function
Work Schedule
Review Team Assignments
Team Member Expenses
Procedure Review
Day Two of the Visit

- Chief Administrative Officer Welcomes the Team
- School Tour
- Standard II Programs
- Interview Students and Faculty

Day Three of the Visit

Recap Programs
- Each team member will communicate to the Assistant Team Leader the Standard 2 Findings of Non-Compliance

Conditions and Standards 1 – 10

Draft of Team Report

Report with the CAO
Day Four of the Visit

- Finalize Draft Team Report—Check for incomplete sections
- Plan Oral Exit Report
- Complete Visiting Team Evaluation of Institution’s Self-Study Report
- Collect Interview Sheets and Check Sheets (Shred after the team report has been printed)
- Discuss Travel Vouchers
- Exit Report
- Once the visit is over, you are not allowed to contact the institution, share information, or provide guidance.

You have been asked to serve as a team member for a Job Corps Center or a Federal/DOD Institution or a Registered Apprenticeship School.

NOW WHAT!
Become familiar with the Manuals and Check Sheets

Federal schools do not use:

- Employer Verification Forms
- Advisory Committee Meetings
- Placement and Licensure
- Plan for Evaluation of Student Personnel Services
- Plan for Placement Services

Criteria Differences in our Federal/DOD and Registered Apprenticeship Institutions
Criteria Differences in our Federal/DOD and Registered Apprenticeship Institutions

- Federal Institutions can think of the Occupational Education Program as an Occupational Training Program (Terminology sometimes helps)
- COE has approved the 75/25 rule for online training for federal schools. The new calculation sheet is in the new ‘Federal’ Handbook
- Federal is not responsible for Title IV or Gainful Employment acts, therefore are not required to document student loans,
- Federal schools do not get potential employers or program graduates since they are the employer.
- However, the military will return to their school to teach at a later date and many federal employees are past military members of that school.
- Federal rarely involve the public in their training, especially the Intel schools, which require a government issued security clearance to enter

Criteria Differences in our Federal/DOD and Registered Apprenticeship Institutions

What is a Registered Apprenticeship Program: A program registered by the U.S. Department of Labor and evidenced by a Certificate of Registration as meeting the standards of the U.S. Department of Labor for Apprenticeship

RA: Standard 1: For RA schools who are governed by an ERISA Board of Trustees, the Trustees can be considered external members of an Institutional Advisory Committee

RA: Standard 2: For RA schools who are governed by an ERISA Board of Trustees, the Trustees can be considered external members of an occupational advisory committee

RA: Standard 2: On the Job Learning or Work-based activity plans are essentially already incorporated in the apprenticeship standards for each program

RA: Standard 7: RA schools are exempt from the requirement to submit the 2nd financial data while the institution is in candidate status. (The institution is still required to submit their most 2 recent audited financials in order to host their initial accreditation visit.)

RA: Standard 9: For RA schools the authorizing entity may be the US Department of Labor or the appropriate state labor department
Entering Data in the Team Report Software

Main Menu

Team Report Software
Postsecondary Programs

Team Report Software

**YES**

For all items marked “YES” on the check sheets, the team member must have institutional documentation to verify compliance.

Findings of Non-Compliance are not written for items marked “YES”.

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**Software**

For all items marked “YES” on the check sheets, the team member must have institutional documentation to verify compliance.
Team Report Software

**NO**

For all items marked “NO” on the check sheets, the team member must have no institutional documentation or have inadequate documentation to verify compliance.

A Finding of Non-Compliance MUST be written for any item marked NO.

Before a Finding of Non-Compliance is written, it must be determined that the institution is in violation of a policy, rule, standard, or condition and that the documentation has not been overlooked.

Final Findings of Non-Compliance, Suggestions, and Commendations must be determined by the team.

FNC are a team decision and must be agreed upon by the entire team.

The Self-Study Report is not the place to inform the Commission about new programs, deleted programs, new branches, changes of location, etc.

Finding of Non-Compliance: Conditions #13: The institution has informed the Commission of all planned and unplanned substantive changes.
Team Report Software

N/A

All items marked “N/A”, the standard or condition being evaluated does not apply to the institution.

Findings of Non-Compliance are not written for items marked “N/A”.

Suggestions

Please list all suggestions for this standard below. SUGGESTIONS ARE NOT REQUIRED. IMPORTANT: A suggestion is not an indication that the institution fails to comply with any certain criterion. Rather, a suggestion is a statement written by the team pointing out improvements that might be made in an educational program or in the operation of some part of the institution to promote educational improvement. The institution may respond to suggestions but is not required to do so.

For every suggestion written, there must be a finding written as well. Number suggestions when more than one is written.

1. Suggestion for this standard? *
   - Yes
   - No
   - N/A

Submit Section  Save Draft  Cancel
Interviews

**Goal:** To Interview every staff member at the Institution

- Plan carefully because site visit time is limited.
- Prepare a list of people to be interviewed.
- Plan interviews in advance.
- Prepare Questions.
- Familiarize yourself with the Suggested Techniques for Effective Interviewing

Mingle and talk with (1) students, (2) instructional staff, (3) administration, and (4) non-instructional staff.

- Keep accurate notes and a list of persons interviewed.
- Avoid “Where I come from, we do it like this.”
- Make no verbal recommendations, nor provide hints on the progress of the evaluation.
Sample Interview Questions

For Instructors

1. What did you learn about your program as a result of working on the Self-Study/Program Supplement?
2. What aspects of your program are you most proud of?
3. What areas of the program would you like to improve?
4. What methods of teaching (lecture, demonstration, practice, OIT/Clinical, Distance Ed, etc.) do you use in presenting information to your students?
5. How do you perform assessments of student learning/performance?
6. What is your completion, placement, and licensure pass rate for students in your program?
7. How do you maintain student files (grades, attendance, progress, etc.)? Show me.
8. How do you incorporate work ethics into your students/program?

For Students

1. How do you know you are progressing in class and on track for completion?
2. What happens if you fall behind?
3. What happens if you get ahead?
4. Why did you choose this school versus other available schools?
5. Do you feel you are getting your money's worth for the education you are receiving?
6. Do you feel supported by instructors and school staff?
7. How is the customer service at the school?
8. Do you feel your training/education is preparing you for the real-world work environment?
9. Do you feel the equipment is state-of-the-art to what is being used in the business/industry?
10. How is health and safety taught in your program?

Team Interview Form

Completed Interview Forms will be emailed to: teamreport@council.org
Team Report Audit

The Team Report Software does a self-audit.

- Green circles indicate the Standard is complete.
- Blue circles indicate the Standard is incomplete and Save Draft was clicked.
- Gray circles indicate the evaluation of the Standard has not been started.

Be Thorough.....
STANDARD 4
Strategic Planning
Generic Version – 2021 Edition

Review each criteria to ensure it is found in the documentation provided by the institution.

<table>
<thead>
<tr>
<th>Standard 4 Criteria</th>
<th>YES</th>
<th>NO</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. The institution has a written strategic plan. [See Section VII. Definitions – Plan] VISITING TEAMS: If NO is checked, leave criteria 2-9 blank. Write one finding of non-compliance that specifies BOTH the requirement for a plan AND each criterion 2-9. (See instructions page.)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>The institution’s written strategic plan includes, at a minimum, the following components:</td>
<td></td>
<td></td>
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<tr>
<td>2. The mission of the institution</td>
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<tr>
<td>3. The vision of the institution</td>
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<td></td>
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<tr>
<td>4. Objectives for a minimum period of three years</td>
<td></td>
<td></td>
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<tr>
<td>5. Strategies for achieving the objectives</td>
<td></td>
<td></td>
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<tr>
<td>6. Current and projected financial resources that provide a basis for initiatives specified in the strategic plan</td>
<td></td>
<td></td>
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<tr>
<td>7. Strategies for evaluating progress toward achieving the objectives</td>
<td></td>
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<tr>
<td>8. The faculty, administration, and institutional advisory committee annually review the strategic plan and revise as necessary</td>
<td></td>
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<tr>
<td>9. The institution annually evaluates and documents the results of the evaluation of progress toward achieving the objectives defined in the strategic plan</td>
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<td></td>
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</tbody>
</table>

Print a Hard Copy of the Check Sheet

Clock Hour/Credit Hour Chart

Must be identical to the CDE Approved Programs List.
Postsecondary Educational Programs

**Postsecondary Educational Programs**

- Programs listed below are those of which the applicant has taken less than an equal portion of the required instructional hours.
- Complete methods of measuring program length.

**C.O.E. Approved Programs List**

- **Standard 3**

These Documents are Left at the Institution

**Verification of Completion, Placement and Licensure—5 Forms**

- Completers—5 Graduate and 5 Non-Graduate Completers
- Placement—5 Graduate and 5 Non-Graduate Placements
- Licensure—5 Graduate who have taken licensure exams

*Institution’s Permanent Accreditation File*
Important things to remember:

- The institution must utilize the most current COE forms/charts (EVF, Rosters, Postsecondary Program Charts, etc.)
- If you have a concern regarding the institution’s documentation, discuss with the team leader first, then if not resolved, contact COE staff for a conference call.
- Be willing to take pictures if the team feels it is germane to documenting a Finding of Non-Compliance.
- Provide the institution with a reasonable timeline to retrieve data.
- Be sure the documentation you ask for is criteria on the check sheets.

Exit Report

The Team will make an informal oral report to the chief administrative officer and/or designees at the conclusion of the visit.
Step 5:

Team Member Finances

Original Receipts
Transportation
Personal Auto
Car Rental
Non-reimbursable Expenses
Accommodations
Guest

After the Team Visit

Use a current COE Expense Voucher
Team members will send to COE electronically.

◦ Complete Expense Voucher (Pages 1 and 2)
◦ Scan and attach all original receipts
◦ File within 14 days of incurring expenses
Possible Dilemmas

- Year 2022: Last accreditation team visit was 4 years ago, and the institution has one program, and only has Occupational Advisory Committee meeting agendas/minutes from 2018
- Year 2022: The organizational chart does not include the Director that was appointed 3 months prior to the team visit
- Branch Campus Visit: All of the students and staff are on a field trip
- COE List of Approved Programs identifies the program as Medical Assisting and the institution advertises the program as Medical Assistant
- The Vocational Nursing Program you are evaluating has a clinical site 2 miles away from campus, are you required to visit clinical sites?
- The Welding Program has a night program that is scheduled Mon.-Thurs. 4:00pm-9:00pm? On Tuesday evening you visit the program and the program is not meeting that evening. What do you do?

Team Report Software Issues/Bugs:

- If the team experiences software issues during the visit, please email Joe Molmer (joe.molmer@council.org) with detailed information of the issue(s). Use snip-it to attached/paste a picture of where the issue occurs in the criteria.
- Copy Elizabeth on the email
Follow-up to a Virtual Visit

1. Required for all Virtual Visits conducted in 2019 and 2020
2. Members from the virtual visit will serve
3. Begin the follow-up visits in 2020 and beyond
4. Team will be based on Team Leader and Team Member availability
5. Notifications will be sent by COE staff

Additional COE Workshops:

Required: Team Leader-Member Part 2