Today's Audience

Public, Private, Federal, Job Corps, Registered Apprenticeships

- Initial, Reaffirmation, Neither
- Team Member, Leader, Neither
- New to COE or Seasoned Veteran
the purpose of this workshop is to discuss how to HOST a team visit

**Show Stoppers**  |  **Deadlines & Transcripts**

**Preliminary Visit**
- Preliminary Visit Worksheet
- Travel Arrangements
- Hotel Accommodations

**Team Visit**
- Travel Arrangements
- Hotel Accommodations
- Schedule/Workroom
- Meals/Social Event
- Finances

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**Before your visit**

**Show Stoppers**
- **Final Self-Study Report** is due to the Team Leader 60 days prior to the team visit
- **Initial Accreditation** - DUE to COE office 60 days prior to team visit:
  - CPL Worksheet
- **Non-Public Institutions-DUE** to COE office 60 days prior to team visit:
  - Deposit and Fees
  - 2 most recent years of audited financials (1.5 composite score minimum) and COE Financial Questionnaire Form
- **Current Training Transcripts**: Self-Study Report and Annual Report
“The team leader shall make a preliminary visit to the institution not less than one month before the dates of the team visit.”

“The purpose of the preliminary visit is to review with the school officials the responsibilities of the school and the team and to assure that preparations are complete (Preliminary Visit Worksheet)”

Preparing for Your Preliminary Visit

• Communicate with team leader about dates (the preliminary visit will be at least 30 days before team visit)
• Follow Council timelines
• Be prepared to discuss all aspects of your team visit
• See Checklist for Team Visit (p. 18, 2018 Self-Study Manual)
Prior to your preliminary visit, you need to prepare the following:

- Digital Exhibits
- Self-Study Report and Annual Report
- Transcripts
- Website and Social Media Announcement
- Copy of Current License (if private)
- Current COE List of Approved Programs
- List of Campuses
- Map of School
- Financial Reports
- Documentation since the last accreditation site visit (Reaffirmation Site Visit)
- Hotel Information and Billing Information
- Travel Information
- Meal and Social Function Information
- Copies of Advisory Committee Minutes
- School Catalog, Brochures, Student Handbook, Staff Handbook, Website Address, Class Schedules, and Faculty Directory

Preliminary Visit Worksheets

(p. 21-24, Guidelines for Accreditation Visiting Teams)

Preliminary Visit Worksheet in MyCouncil for Team Members
During Your Preliminary Visit, the Team Leader will...

- Take a tour of facilities
- Review prepared exhibits & discuss Self-Study Report
- Examine financial statements (non-public)
- Determine work room suitability
- Set schedule & agenda
- Prepare communication & materials for team

Tips to Help You Be Prepared...

- Use your team leader and COE staff members as your resources
- The team leader is there to help you and to ensure your institution is ready for the team visit
- Finalize all plans for the team with the team leader during the preliminary visit
- COMMUNICATION IS KEY...
- TAKE NOTES
Items Discussed During the Preliminary Visit

- **Team Finances** (discuss with leader)
  - Team members must make their own travel arrangements to the airport and be prepared to pay for travel, food, & lodging during the visit
  - Generally, there are two ways to bill:
    - The school may arrange for direct billing of hotel, meals, snack, etc.
    - The team members may pay expenses and turn in receipts to COE

- **Hotel Accommodations**
  - Hotel selection is a mutual decision between the team leader and school officials
  - Team leader will approve the hotel on preliminary visit
  - It should be clean, safe, and centrally-located
  - Consider meeting space & restaurant

Preparing for Team Visit

- **Transportation**
  - During the visits, the institution is responsible for transportation:
    - Between the airport & hotel on arrival and departure
    - To & from hotel to school each day
    - To & from social functions
    - To visit campus facilities and/or clinical sites
  - Each team member is responsible for making their own travel arrangements from home to the institution (airport).
  - Institution may provide transportation by:
    - Using school vehicles
    - Using personal vehicles
    - Renting vehicles- team leaders and members should not rent vehicles unless approved by the institution
Meals & Social Function

➢ The purpose of the social function is to provide an opportunity for members of the institution’s staff to become acquainted with the members of the visiting team. (Consider Advisory, Community Members, etc.)

➢ Talk to your team leader about social function expectations during preliminary visit. (p. 17, 2018 Self-Study Manual)

➢ Breakfast
  ▪ At hotel or school may provide

➢ Lunch (usually a working lunch)
  ▪ Buffet, Culinary Program, or ordered

➢ Dinner (varies; discuss with leader)
  ▪ Social event on first night
  ▪ School admin with team on second
  ▪ Third dinner at team discretion

➢ Snack (drinks & items)

Workroom Space

➢ The purpose of the workroom is to:
  ▪ Review exhibits
  ▪ Complete the team report
  ▪ Take breaks
  ▪ Meet as a team
  ▪ Focused & confidential discussions

➢ The workroom should have:
  ▪ Tables and chairs for team members to work
  ▪ Computers or laptops w/exhibits
  ▪ Printer
  ▪ Access to phone
  ▪ See Self-Study Manual for supply list

➢ The room should be:
  ▪ Centrally-located
  ▪ Large enough to accommodate team and exhibits
  ▪ Secure and clearly identified
  ▪ Off limits to faculty and staff
  ▪ Consider it “sacred space” during visit

➢ REMEMBER...
  ▪ Exhibits and team reports are digital! It is necessary to have computers and laptops with internet connections (Firefox or Chrome) available for team members.
  ▪ A printer is also required
  ▪ Have an IT person on standby

Suggested Additional Resources:
  • School Catalogs & Brochures
  • Student and Staff Handbooks
  • Faculty Directory w/pictures (if possible)
Workroom Space Examples

Use the workroom to display info about your school, maps of campus, or pictorial directory of faculty & staff

Preparing for Team Visit

Before the team visit, email the following to the Team Members:

- Welcome Letter/Email
- Request travel arrangements
- Establish contact person at school (include cell #)
- Request dietary needs (good chance to ask about snacks)
- Self-Study Report (at least 20 days prior to the team visit)

Suggestion:
Consider an emailed survey to collect information from team members.
Before the Visit, check Critical Items again:

- Accreditation file
- All exhibit files (NO BLANK FORMS)
- Plans, procedures, and evaluations (NO BLANK FORMS)
- Publications
- Employer Verification Forms
- Advisory Committee Minutes
- Program Curriculum Materials
- Media Services
- Walk through of facilities checking for safety and emergency items
- REMEMBER to review your notes from the preliminary visit

Prepare your Faculty and Staff:

- What to expect and what will be expected during visit?
- Make sure everyone has read the self-study report
- Make sure everyone is familiar with check sheets
- Answer any questions they may have about the visit or process
- Who?
- What?
- When?
- How?
- Where?
- Why?

During Your Team Visit...

- Point person...who is responsible for coordinating your visitors, answering questions, etc.?
  - Easy access
  - Available and helpful
- Generally, everyone else is business as usual!
- Remind students and staff
- Get ready to respond to questions, produce clarifying documents, etc.
How many team members will we have?

- Generally, determined by:
  - Number of programs
  - Size of faculty and staff
  - Number of students enrolled
  - Number of campuses
  - Distance between campuses

Remember Your Resources:
- Handbook of Accreditation
- Self-Study Manual
- COE Staff
- TEAM LEADER

How do we host unannounced teams?

- Team members will arrive completely unannounced and stay for one day only
- Be prepared with the check sheets & documentation
- Team members will need a brief tour, access to a meeting space, and will deliver an exit report
- Have a plan so that someone with knowledge of your accreditation activities can be available
- Keep in mind hospitality

Remember Your Resources:
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- Self-Study Manual
- COE Staff
- TEAM LEADER