



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

Overview

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

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

Preliminary Visit

“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)”

Preliminary Visit

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)

Preliminary Visit

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

Preliminary Visit Worksheets

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

Preliminary Visit Worksheet in MyCouncil for Team Members

Preliminary Visit Worksheet		YES	NO
GENERAL INFORMATION			
1. Completed by school regarding the preliminary visit (at least 60 days before the team visit)			
2. Contact the COE office immediately if YES. The institution shall check to find an original document (either a copy of another institution's last advisory document or is an updated version of the last self-study and during the last accreditation team visit)			
3. Contact the COE office immediately if NO. Institution has certificate proving Candidate Academy or Self-Study/Visiting absence within 60 days from the visiting team			
4. Contact the COE office immediately if NO. Narratives for the Core Areas and all Standards of Accreditation for the institution's self-study are in final draft form			
5. Contact the COE office immediately if NO. The institution has had students continuously in attendance for a minimum of 100 credit hours for regularly scheduled classes, offerings, and meeting periods.			
6. Advisory committee minutes or non-public information on file with the Council has been verified. Only changes in membership information that have not been reported to the Commission must have a representative member present (Conditions of Accreditation)			
TOUR OF THE FACILITIES - Tour of facilities has been made, and the following items have been confirmed:			
1. Show becomes familiar with the layout of the main campus and the location of all other campuses (if any)			
2. Accuracy of all location names and street addresses. Any campuses that have names different from that of the main campus or street addresses that have not been approved by the Commission must have a representative member present (Conditions of Accreditation)			
3. Institution has data files with local and state accreditation and (if private)			
4. Current License (for public institutions only)			
5. Self check completed on meeting, registration, and physical facilities			
6. Self check completed on media content			
7. Self check completed on meeting and records storage. (Records are kept in fireproof storage device, separate records are kept off-site or on computer database, or an electronic track system is in place.)			
INSTITUTIONAL ADVISORY COMMITTEE - If one has been reviewed and the following has been confirmed:			
1. Institutional advisory committee is in place			
2. Minutes filed that committee approved institutional mission			
OCCUPATIONAL ADVISORY COMMITTEES - If one has been reviewed and the following has been confirmed:			
1. Occupational advisory committees are in place for each occupational area taught by the institution			
2. Minutes meet that document has meeting has been held each year			
3. Curriculum for each program has been reviewed			
4. Roster of each occupational advisory committee designating "official members" with their name, place of employment, and occupational title (All committees should have the roster)			
5. Minutes reflect committees have confirmed that programs offered are congruent with the mission of the institution			
6. Minutes reflect that committees have approved programmatic objectives			
7. An occupational advisory committee has completed the required survey of standards. (Show receipt from website that is printed in evidence that Survey of Standards was completed)			
COPIES REVIEWED - Copies of the following have been obtained for review (Online/Handcopy):			
1. School Catalog			
2. Student Handbook			
3. Staff Handbook			
FINANCIAL STATEMENTS - Financial statements have been examined (non-public) (institutional) and the following has been confirmed:			
1. Audited financial statements for the two most recent fiscal years are available for the team visit			
2. COE financial questionnaire for the most recent fiscal year is available for the team visit			
PERMANENT ACCREDITATION FILE - Permanent accreditation file has been reviewed and contains the following:			
1. Copy of all non-public correspondence with COE			
2. Copy of the last self-study			
3. Copy of the last accreditation visiting team report and all other team reports since the last accreditation			
4. Copy of the institution's response report for the last accreditation team visit and all other response reports to visiting teams since the last accreditation visiting team			

Guidelines for Accreditation Visiting Teams - 21

Preliminary Visit

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

Preliminary Visit

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

Preliminary Visit

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

Preparing for Team Visit

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

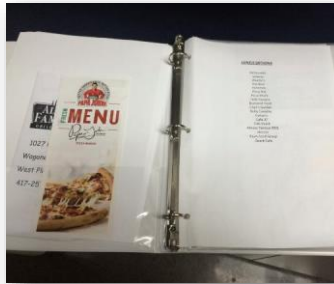
Preparing for Team Visit

- 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

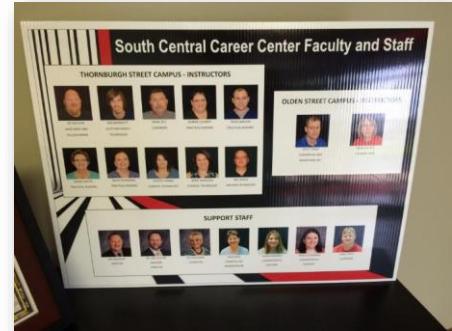
Suggested Additional Resources:

- School Catalogs & Brochures
- Student and Staff Handbooks
- Faculty Directory w/pictures (if possible)

Workroom Space Examples



Preparing for Team Visit



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.

Preparing for Team Visit

- Accreditation file
- All exhibit files (NO BLANK FORMS)
- Plans, procedures, and evaluations (NO BLANK FORMS)
- Publications

Before the Visit, check Critical Items again:

- 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?
 - Where?
- When?
 - How?
 - Why?

During the Team Visit

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.

Frequently Asked Questions

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

Frequently Asked Questions

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:

- Handbook of Accreditation
- Self-Study Manual
- COE Staff
- TEAM LEADER

Questions?

