Self-Study Workshop
DoD and Federal Institutions

Virtual
November 15th, 2021

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Objectives

- **Section #1: COE accreditation process**
  - Rules, policies, and the manuals
- **Section #2: The Self-Study**
  - What it is, why it is important, timelines, and strategies,
  - Written narrative
  - Exhibits
- **Section #3: Site Visit**
  - Interconnection of Self-Study Report and accreditation team visit
- **Section #4: Resources & Best Practices**
  - Resources for a successful Self-Study Report and site visit
- **Section #5: (Summary Q&A time)**
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Context for Accreditation

- All accrediting organizations are private (non-governmental and non-profit)
  - Uniquely American
  - Overseen by Department of Education and/or Council for Higher Education Accreditation (CHEA)

- Embedded principles:
  - Training institutions have primary responsibility for academic quality
  - Institutional autonomy is essential
  - Education/training thrives on decentralization

- Reflects comprehensive approach to assessment
  - Adds value through
    - Ensuring quality and continuous improvement
    - Enabling government to make sound judgments about the use of public funds
    - Aids students in decision-making
  - Facilitates an emerging “culture of evidence”

Source: CHEA
Accreditation for DoD Schools

DoD Instruction 1400.25, Volume 410, states:

“It is DoD policy to implement TE&PD activities and programs for civilian employees at the highest possible level of academic quality and cost-effectiveness, consistent with the standards established by external accreditation and certification entities recognized by the U.S. Department of Education when applicable standards exist, or standards established by DoD when external standards do not exist or are inappropriate.”

Accreditation Benefit

- Not all military schools are accredited.
- The reasons for the importance of accreditation are numerous, the largest being that civilian colleges may not accept credits for courses from non-accredited military institutions.
- More than that, accreditation ensures that the students are receiving a quality education that is reliable and valuable.
- Also, accreditation status provides assurance to the tax-payer that the institution is providing quality education & training.

COE Accreditation Process

1. Application for candidacy
2. Candidacy visit
3. Commission vote to approve candidacy
4. Self-Study Workshop
5. Preparation of Self-Study Report
6. Preliminary visit by team leader
7. Accreditation visit
8. Team report
9. Institutional response
10. Commission vote to approve, defer, and deny accreditation
1. Submit a letter of intent to seek candidacy with COE
2. Attend a candidate academy (Mar, Jul, Nov) within 18 months of estimated date of accreditation visit
3. Submit a candidate application
4. Host a candidate team visit; receive report and provide response to findings
5. Gain candidacy approval by the COE commission (Commission meets Feb, Jun, Sep, & Nov)
6. Attend Self-Study Workshop
7. Conduct Self-Study Assessment and prepare report (takes 6 – 12 months)
8. Host a preliminary visit (30 days prior to team visit)
9. Host accreditation team visit and a receive visiting team report
10. Respond to visiting team report
11. Initial accreditation or reaffirmation awarded by the Commission (at Feb, Jun, Sep, or Nov meetings)

No substantive changes
COE References

- COE Policies and Rules of the Commission
- COE Handbook of Accreditation for Federal Institutions
- COE Self-Study Manual *(See Changes)*
- COE Staff (1-800-917-2081)
- COE Website *(www.council.org)*
Accreditation & Self-Study is a Team Effort

School  COE
Visiting Team  Federal Community
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Purpose of the Self-Study

For the School

- Advance institutional self-understanding and self-improvement
- Serve as a strategic planning vehicle for improvement of all institutional services

For the Visiting Team

- Familiarize the visiting team with the institution’s programs and services
- Provide initial evidence of conformance to standards using narratives and exhibits

How the School tells its story
Basic Tenets Governing the Self-Study

To realize full benefits of the self-study project, ensure:

- Self-Study process is viewed as a means to institutional improvement
- All faculty members, administrators, advisory groups, and the governing board is involved
- Contents of the report are determined only after extensive discussion involving members of the institution
- All aspects of the institution’s relationship to the conditions and standards are analyzed
- Report narratives are written as concisely as possible, and non-compliance is addressed
What is the COE Source for the Self-Study Process?

The COE Self-Study Manual:
- Guidelines
- Format
- Characteristics
- Standards 1-10
- The Visiting Team
Self-Study Guidelines (Not Inclusive)

- Begin with the end in mind
- Use a steering committee to guide the effort, but not do all the work!
- Involve leadership and all faculty/staff
- Select standard leads and team members to:
  - Analyze the institution relative to the standards/criteria
  - Concisely address your approach to each standard
  - Provide supporting evidence/exhibits (required for each criteria)
- Provide orientation to the process for everyone involved
- Discuss what goes into the report before attempting to write it
- Meet with standard leads and team members regularly to monitor milestones and tasks
- Allow time for editing, integrating, and harmonizing (readability)
- Make the self study a means to an end (improvement)

*Note: The self-study report must be completed prior to the preliminary visit of the visiting team leader*
Self-Study Timetable

The Steering Committee establishes the schedule based on estimated date of site visit

- Beginning date of the self-study (e.g., 12-18 months prior to visit)
- Deadline for preliminary data collection
- Meeting dates of committees
- Dates for completion of committee reports
- Final date for review of committee reports
- Final date for completion of self-study report
- Date for completing the final review of report
- Target date for transmitting final draft Self-Study report to team leader – 45 days before the planned site visit!
- Tentative date of preliminary visit by team leader (30 to 45 days prior to the first day of the scheduled team visit)
What is Included in the Self-Study Report?

All Self-Study Reports, regardless of institutional size or mission, have identical components

- Cover
- Preface
- List of Self-Study Committee (Team) Members
- Table of Contents
- Institutional and Community Characteristics
- Conditions Check Sheet & Findings
- Standards (1-10) Narratives
- Glossary
- Supplements to the Study (if applicable)

Note: Submit the self-study to the COE office and to the visiting team as ONE document twenty (20) days prior to the scheduled visit. If the electronic file is too large to send as a single document, it is acceptable to submit it as one document via cloud/online storage delivery system or mailing a flash drive.
Institutional Characteristics

- Name and address
- List all campuses and addresses
- History of the institution
  - Date of Charter
  - Date first student attended
  - Date first student graduated
- Demographic data
  - Number of programs and types of credentials offered
  - Overall enrollment
  - Total faculty and staff
- Type of calendar system (quarter, semester, tri-semester, annual or continuous)
- Definition of a full-time student
- Delivery Systems (Online, In-residence, Computer-based, etc.)
Community Characteristics

Describe ...

- Geographic area *served* (exhibit a map)
- Population *served* (site date and source)
- Important population characteristics
- Any anticipated changes to the population
The Conditions Check Sheet must be
- Completed
- Included as part of the self-study document
Fill out and provide an explanation for any “NO.”
Standards

- **Standard 1**: Institutional Mission
- **Standard 2**: Educational Programs
  - Admissions
  - Programs
  - Instruction
- **Standard 3**: Program and Institutional Outcomes
- **Standard 4**: Strategic Planning
- **Standard 5**: Learning Resources
  - Media Services
  - Instructional Equipment
  - Instructional Supplies
- **Standard 6**: Physical Resources and Technical Infrastructure
- **Standard 7**: Financial Resources
- **Standard 8**: Human Resources
  - General
  - Faculty
  - Administrative and Supervisory Personnel
  - Instructional Support Staff
  - Non-Instructional Support Services
- **Standard 9**: Organizational Structure
- **Standard 10**: Student Services
How Is the Report Organized?

- Written in narrative form
- Each Standard is a separate chapter
- Each chapter has four parts
  - Part #1 - Introduction
  - Part #2 - Analysis
  - Part #3 - Challenges & Solutions
  - Part #4 - Summary
Part #1: Introduction

Each Standard begins with a one or two-introductory paragraph that:

- Provides a brief history for each Standard and educational program, which briefly describes the history, mission and breadth of each program

- Describes any unique circumstances or situations that might need to be explained
Example of Introduction

Standard 1
Institutional Mission

The mission of the Department of Defense (DOD) is to provide the military forces needed to deter war and to protect the security of the United States. Since the creation of America’s first army in 1775, the Department and its predecessor organizations have evolved into a global presence of three million individuals, stationed in more than 140 countries and dedicated to defending the United States by deterring and defeating aggression and coercion in critical regions. The Department embraces the core values of leadership, professionalism, and technical knowledge. Its employees are dedicated to duty, integrity, ethics, honor, courage, and loyalty.

The Department of Defense (DoD) is one of the nation’s largest employers, with approximately 1.4 million Active Component, 836,000 Selected Reserve and 245,000 Individual Ready Reserve forces; and 735,000 appropriated and 126,000 non-appropriated civilian employees. Our military service members and civilians operate in every time zone and in every climate, and more than 450,000 of our employees serve overseas to protect the security of the United States, the Department operates approximately 5,285 aircraft and 293 ships.
Part #2: Analysis

The described approach to the criteria, supported by the documents (Exhibits) you gather, provides the basis for your report:

- State the criteria “Exactly” as worded on Check Sheet and use any subdivisions listed on the Check Sheets.
- Number the criteria just as it is numbered on the Check Sheets.
- Number the Exhibits with the Standard #, Criterion #, Unique Exhibit # (e.g., Exhibit 1.3.2).
- Describe in narrative form how the institution complies with the criteria backing that up with the exhibits:
  - DO NOT include the actual ‘Exhibits’ in the self-study.
  - DO Include a link AND a numbering description in the appropriate place in the document.
- Cite specific events; be concise.
- Ensure your analysis answers the criteria.

*Remember: Proof Not Promises!*
1. The primary mission of the institution is to instruct students to such competency levels essential to success in their occupations, including job knowledge, job skills, work habits, and/or attitudes.

Our institution is governed by DoD regulation Xyz and Army Reg 1965 (Exhibit 1.1.1 DoD Reg Xyz, Exhibit 1.1.2 Army Reg 1965). Continue to discuss your institution’s training mission, how it fits in the bigger picture such as, how the student applies the training they receive. You may want to discuss how the school got started. Was it an executive order or a DoD directive? (Exhibit 1.1.3 Executive order or charter).

Continue with completion of a course, especially for the military, establishes the student’s proficiency and ability to accomplish their assigned duties and qualifies them for future advancement in their service (Exhibit 1.1.4 Organizations SOP; Exhibit 1.1.5 ACE CREDIT Sheet; Exhibit 1.1.6 Compare curricula to civilian https://www.careeronestop.org/Toolkit/Jobs/match-veteran-jobs.aspx; https://www.onetonline.org/).
Analysis – The Exhibits!

- **Every Criteria** **MUST** have at **LEAST ONE** exhibit to support compliance of the criteria
  - **NOTE:** Although one Exhibit is the minimum, Criteria must contain sufficient Exhibits to support the narrative.

- Use **UN-classified** exhibits (unless absolutely necessary)

- One exhibit can support several criteria, e.g.; Strategic Plan (Highlight the paragraphs that support each criteria)

- Several exhibits may be used to support a single criteria

- Exhibits are the “**Proof**” that the school is in compliance, thus:
  - **Blank forms are NOT proof that the form is being used**
  - **Forms must be filled in** (Redaction, such as the SSN, is OK but enough information must be left to show compliance)
  - **Regulations and Policies are the guidance (promise), not the proof, but recommend including critical regulations as well**
A little bit more about Exhibits

Exhibits are in electronic format.

Clearly-labeled digital files can be placed within subfolders.

Labels should correspond to the criterion numbers on the Standards Check Sheets.

Make it easy for the visiting team members to access exhibits.
Written Plans and Procedures

Self-Study Report must describe implemented plans and procedures required by COE Standards

- Written plans and procedures are exhibits and the institution must provide additional documents to demonstrate the plans and procedures are in use.

- Written plans
  - Have objectives, purpose, or intent
  - Outline activities to achieve objectives
  - Specify roles and responsibilities
  - Include guidelines/timelines for review and evaluation

- Written procedures
  - Address specific tasks
  - Include step-by-step instructions
  - May require forms and reports
Objective #3: Challenges and Solutions

The challenges and solutions should address any areas of non-compliance with the criteria and/or areas where continued compliance may be difficult to maintain:

- Explain how the institution is resolving challenges and working toward compliance or how the institution is dealing with an emerging issue that may threaten long-term compliance.
- Do not offer excuses for non-compliance.
- Tell how the school has solved problem(s) and/or working to come into compliance.
Example of Challenges and Solutions

Challenges & Solutions must be specific to issues, challenges, and concerns, along with solutions as applicable.

- **Challenge:** The most critical challenge facing the Physical Resources and Technical Infrastructure is keeping up with the fast-paced high tech developments in educational technology and social networking. Additionally, the federal budget has historically keeping us in a continuing state of flux, which inhibits our ability to plan for future growth in technology. The Department of Defense faces a changing and equally uncertain fiscal environment.

- **Solutions:** The key to managing training in an uncertain budget environment is to constantly watch how we spend taxpayer dollars. Our team persistently searches for better ways to spend current dollars and other ways to save while maintaining top-level training.
Part #4: Summary

A brief one or two paragraph conclusion ends each chapter.

- Simply provide an overview of the introduction, analysis, and challenges and proposed solutions
- This is not the place to introduce new information, but rather to summarize and synthesize the chapter
### Glossary of Abbreviations, Acronyms, and Terms

<table>
<thead>
<tr>
<th>Acronym</th>
<th>Full Form</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>AAE</td>
<td>Acquisition and Acquisition</td>
<td>Acquisition and Education; refers to the process of obtaining and managing resources, primarily in the military and government contexts.</td>
</tr>
<tr>
<td>ACLU</td>
<td>American Civil Liberties Union</td>
<td>An American organization that advocates for individual rights and civil liberties.</td>
</tr>
<tr>
<td>ADS</td>
<td>Acquisition, Development, and Systems</td>
<td>Refers to the process of acquiring, developing, and systems integration in military contexts.</td>
</tr>
<tr>
<td>AGI</td>
<td>Advanced Geospatial Intelligence</td>
<td>Refers to the use of satellites and other advanced technologies for intelligence and surveillance.</td>
</tr>
<tr>
<td>AI</td>
<td>Artificial Intelligence</td>
<td>A subfield of computer science that focuses on developing systems that can perform tasks that typically require human intelligence.</td>
</tr>
<tr>
<td>ANG</td>
<td>Air National Guard</td>
<td>A component of the United States Air Force.</td>
</tr>
<tr>
<td>AN/USC</td>
<td>Aviation, Navigation, and Communications</td>
<td>Refers to the technology and systems used for communication and navigation in aviation.</td>
</tr>
<tr>
<td>APIM</td>
<td>Acquisition Planning and Integration Management</td>
<td>A process for integrating acquisition plans across different programs.</td>
</tr>
<tr>
<td>ARRL</td>
<td>American Radio Relay League</td>
<td>An organization dedicated to radio communication and broadcasting.</td>
</tr>
<tr>
<td>ARB</td>
<td>Acquisition Reform Board</td>
<td>A board established to improve the management of acquisition contracts.</td>
</tr>
<tr>
<td>ASC</td>
<td>Acquisition Support Center</td>
<td>A center dedicated to providing acquisition support and services.</td>
</tr>
<tr>
<td>ASRA</td>
<td>Acquisition, Support, and Related Activities</td>
<td>Refers to the support activities associated with acquisition.</td>
</tr>
<tr>
<td>ARD</td>
<td>Acquisition, Research, and Development</td>
<td>Refers to the process of acquiring, researching, and developing new technologies and systems.</td>
</tr>
<tr>
<td>ASB</td>
<td>Acquisition Support Board</td>
<td>A board responsible for overseeing the acquisition process.</td>
</tr>
<tr>
<td>ASR</td>
<td>Acquisition Support Resource</td>
<td>A resource for acquisition support.</td>
</tr>
<tr>
<td>ASW</td>
<td>Acquisition Support and Warfare</td>
<td>Refers to the support for acquisition within the context of warfare.</td>
</tr>
<tr>
<td>ATLAS</td>
<td>Acquisition, Technology, and Logistics</td>
<td>Refers to the process of acquiring, developing, and managing technology and logistics.</td>
</tr>
<tr>
<td>ATBL</td>
<td>Acquisition, Technology, and Business</td>
<td>Refers to the process of acquiring, developing, and managing business and technology.</td>
</tr>
<tr>
<td>ATMS</td>
<td>Acquisition, Technology, and Management Systems</td>
<td>Refers to the management of technology and systems acquisition.</td>
</tr>
<tr>
<td>ATW</td>
<td>Acquisition, Technology, and Warfare</td>
<td>Refers to the role of technology in warfare.</td>
</tr>
<tr>
<td>AWCM</td>
<td>Acquisition, Weapon, and Command Management</td>
<td>Refers to the management of weapon systems and command.</td>
</tr>
<tr>
<td>BCC</td>
<td>Base Command Center</td>
<td>A command center for a military base.</td>
</tr>
<tr>
<td>BEM</td>
<td>Basic Education and Management</td>
<td>A program for basic education and management training.</td>
</tr>
<tr>
<td>BCP</td>
<td>Basic Course Program</td>
<td>A program for basic education and training.</td>
</tr>
<tr>
<td>BCT</td>
<td>Basic Course Training</td>
<td>A form of basic education and training.</td>
</tr>
<tr>
<td>BER</td>
<td>Basic Education and Research</td>
<td>A program for basic education and research.</td>
</tr>
<tr>
<td>BES</td>
<td>Basic Education and Support</td>
<td>A program for basic education and support.</td>
</tr>
<tr>
<td>B诣</td>
<td>Board of Visitors</td>
<td>A board responsible for visitors and visitors' services.</td>
</tr>
</tbody>
</table>
What is not included in the Self-Study?

- Objectives from the Handbook of Accreditation
- Standard 2 Program Supplement and Composite (each program is included in Standard 2)
- Plans, Policies, and Procedures
- Institutional Governing Body
- Financials and COE Questionnaire
DoD and Federal Exemptions

- DoD and other Federal institutions do not complete the:
  - Educational Program Chart
  - Clock Hour/Credit Hour Chart
  - Completion-Placement-Licensure Form
  - Employer Program Verification Form

- The Federal accreditation criteria requires a governing body; however, we do not require Occupational Advisory Committees

- Check with COE (800-917-2081) if you have questions regarding this exemption
Personnel Rosters

- Each campus has its own personnel rosters
- Instructional staff
  - Group instructors by program
  - Indicate associate degree faculty with asterisk (*)
  - Workload is shown in hours per week
- Administrative/Supervisory staff
  - Group by service area (Student Services, Business Office, Financial Aid, etc.)
- Integrate as an Exhibit within Standard 8
- Due to PII concerns, we don't need to publicize certain information outside the Federal community; however, it may be needed internally and required by the accrediting agency, which aligns to Standard #8, faculty credentialing.
Warning

- Self-Study Report is *not* the place to inform the Commission about substantive changes such as new programs, new branches, changes of location, etc.

- There is a specific application procedure required for Commission approval of these types of substantive changes.
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Self-Study Report and Team Visit

The Self-Study Report
- Involves all institutional personnel in preparation and/or review
- Familiarizes team members with institution’s programs, services, and characteristics
- Provides a valuable “first impression” of the institution
- Describes the institution’s processes
- Describes compliance with the standards and criteria

The Visiting Team
Visiting team verifies that the report is an accurate description of activities taking place at the institution and that the exhibits support the narrative in the report

The Exhibits
- Provide the proof not just the promise that Institution complies with the standards and criteria
- Must demonstrate that the Institution follows documented processes

Make sure all terms are explained
Team Visit Timeline

**Preliminary Visit**
(30-45 days prior to Visiting Team)
The Team Lead can postpone the Visiting Team visit if the Institution is not prepared

**In-Person Team Visit**
Exhibit Review conducted prior to Team Visit
Day 0: Travel and first team meeting
Day 1: Interviews
Day 2: Follow-up and Out brief

**Virtual Team Visit**
Exhibit Review conducted prior to Team Visit
Day 1: Follow-up and Interviews
Day 2: Follow-up and Out brief
The Out-brief Concludes the Site Visit

- Exit brief between COE Team Leader and institution’s Chief Administrative Officer (CAO)
  - Review all recommendations, suggestions, and commendations
- Team Leader provides a formal report to COE within 30 days
- Shortly thereafter COE forwards report to the institution
- Institution has 30 days to respond to all findings on any failure to comply
Institutional Response to a Finding

**Issue:** The Visiting Team finds that the job-related health, safety, and fire prevention were not integrated into parts of the instruction.

**Response:** We recognize the importance of student health, safety, and fire prevention and have taken the following steps to shore up existing processes:

- Appointed a Student Safety Officer
- Placed fire exit maps in all classrooms
- Standardized initial student orientation lessons within all classes to cover health, safety, and fire prevention issues
- Added a mandatory 30-minute safety lesson to classes which handle hazardous materials to include Chemistry 101

We appreciate the Visiting Team’s recommendation and have taken the following steps needed to assure compliance...

*Note: Send exhibit (Proof) demonstrating criteria being met*
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Components for a Successful Self-Study Report

- Institutional leadership support
- Commitment of time and resources
- Involvement of all members of the institution
- Adherence to the Self-Study Manual guidelines and check sheets
- Objective perspective, easy to read, with a focus on institutional improvement
- Early involvement with COE’s Team Leader
Requirements for Successful Site Visit

- Institution firmly resting on a foundation of standards
- Well-written and **widely-understood** Self-Study Report that accurately describes the approach used to comply with standards, the degree of deployment, and, where applicable or available, results (*culture of evidence*)
- Establish common understanding of standards
  - Newsletters in the year preceding the visit
  - Mock-review to test for conformance
  - All-hands meetings to get the word out
  - Everyone knowledgeable of the Self-Study Report
- Pride in what you do, how you do it to standard, and how you know your work is of high quality and continually improving

*Make sure all key participants are available during the site visit*
Self-Study Lessons Learned

- Ensure senior leadership buy in to the process and provide sufficient resources
- Align self-study committee assignments to job responsibilities when possible
- The lead(s) for a self-study (new or reaffirmation) need to be working hard at the effort several months out; it is more than an additional duty
- Assign a team lead and alternate for each standard and for each major educational course/program offered by the school

Source: 2013 COE Strategic Planning meeting and 2009 DoD and Federal Institutions Survey on Self Study
Self Study Lessons Learned

- For small schools, get everyone involved in the process; for large schools, involve all levels and types of personnel in the analysis of criteria.
- Plan sufficient time to orient team leaders and committee members and for all report tasks including product reviews. (Large schools may take 12 months or more)
- Work to complete Standards 2, 5 and 8 first as these sections may be longest and most complex.
- Check all standards write-ups against each other to avoid contradictory statements.

Source: 2013 COE Strategic Planning meeting and 2009 DoD and Federal Institutions Survey on Self Study
Suggested Strategies for Maintenance

- Require an annual sign-off from standards committee and regional campus leads that all standard criteria were met as documentation for your files prior to COE annual report.
- Keep exhibits up-to-date (aligned to Annual Report).
- Update the challenges and solutions section of the self study as part of your institution’s strategic planning.
- Encourage volunteers from your school for accreditation visits to other schools.
- Participate in training events hosted by COE and the DoD / Federal Agency community of practice (DISCOURSE).
- Host an awareness event for your school’s personnel.
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Self-Study Discussion
Federal Community of Practice

- Federal Community of Practice
- Why federal institutions should be accredited
- How to host a federal institution site visit
- Revisions to policies, procedures, and changes in the federal manual will be presented in the second session of the Federal Community of Practice.
- Discussions specific to Federal institutions
2021 Self-Study Submission

- The Council now requires only one digital copy of the Self-Study to be submitted to the Commission Office to
  - Anita Lachhonna at anita.lachhonna@council.org.
  - Amanda Lough at amanda.lough@council.org.
- Submit the document as ONE document 20 days prior to the scheduled visit
- Digital Document Format: PDF, Google Drive, Dropbox, etc.
- Ensure to provide COE staff with appropriate access information
- The institution should maintain at least one copy of the Self-Study Report for the school’s permanent accreditation file
If You Want COE Credit for Attending this Workshop...

Self-Study Workshop Certificate
Contact Information

Council on Occupational Education
7840 Roswell Road, Bldg. 300, Suite 325
Atlanta, GA 30350
(770) 396-3898 or (800) 917-2081
Fax: (770) 396-3790
Questions