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

**Note:** Some information within this presentation will not be applicable to all attendees (e.g., Federal, Job Corps, and Apprenticeship schools)
Types of Visits

- Candidate Visits
- Initial Accreditation Visits
- Reaffirmation Visits
- Unannounced Visits
- Focused Visits
- Follow-up Visits for Virtual Teams
- Substantive Change Visits

Currently, all upcoming team visits will be:

- In-person
  or
- 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
- 60-days prior to the visit, you should see a complete draft of the self-study. Work with the school to revise as needed.
- Ensure correct Check Sheets are applied (see MyCouncil)
- Approve the Self-Study Report prior to the team 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. If the school is unprepared, contact COE staff, may need to postpone
- 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.
COE Request for Team Leader Service

- 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.

If information is inaccurate, contact COE staff.
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

FTE Information

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<th>Full Time Equivalent</th>
<th>Dues Amount</th>
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Campuses

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<td>Tennessee College of Applied Technology - Cookeville Higher Education Center (CHEC)</td>
<td>Active</td>
<td>Extension</td>
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<tr>
<td>128503</td>
<td>Tennessee College of Applied Technology - Ridgeman Instructional Service Center</td>
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</tr>
<tr>
<td>128504</td>
<td>Tennessee College of Applied Technology - Jackson Country Instructional Service Center</td>
<td>Active</td>
<td>Instructional Service Center</td>
</tr>
</tbody>
</table>
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!

Normally, 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 outlined 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.

Note: Due to a limited number of volunteers, as well as scheduling issues with volunteers and institutions, some teams may not be complete and have a full roster to meet some time requirements mentioned.
Preliminary Visit Tasks

- Review the institutions Self-Study, normally 60 (calendar) days prior to visit. Provide feedback on the document and allow the institution to revise as needed. If revisions are recommended, allow the school time to revise. However, no later than 45-days prior to the team visit, review and approve the final draft of the Self-Study report.

- If no revisions are needed, approve the institutions Self-Study and notify COE staff.

- Schedule visit at least 30-45 days prior to scheduled date of accreditation visit

- Be prepared to spend a minimum of a full workday 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 look back 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 following documentation must be kept on file from one accreditation visit to the next. All this documentation will be prepared as exhibits for the visiting team.

- Institutional Advisory Committee agendas and minutes
- Occupational Advisory Committee agendas and minutes
- All Plans—showing yearly review
- Records of Student Refunds
- Grievances
- 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 workshops 6-18 months prior to the team visit
- Institution did not submit a relevant, accurate, and well-organized Self-Study to the Team Leader 60 days before accreditation visit
- Overall, the institution is ill-prepared to host an accreditation visit. During the preliminary visit it was clear there was a lack of evidence, documentation, and exhibits to address accreditation criteria identified in the Self-Study/Check Sheets.
- 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
  - 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

- Team Schedule
  - Remember to schedule time to speak to night schools' students and staff, if applicable
  - Remember to visit ALL COE-accredited campuses. And plan to visit at least one clinical and/or externship site

- Expense Receipts

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Sample Email
From Team Leader To Team Members

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Stay in touch with your team members
Team Member Information

Next Steps
Team Report Software

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

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

Travel Plans

1. Will Institution Provide Transportation from Airport?
   - Yes
   - No

2. Name(s), email, and telephone numbers of person(s) to whom team member(s) should send travel plan and request(s) for local transportation

First Meeting of the Team

1. Time
   yyyymm-dd hh:mm a

2. Place

3. Estimated time of final meeting
   yyyymm-dd hh:mm a
Next Step
Team Leader Information

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
- [x] No

Submit Section  Save Draft  Cancel

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
### Preliminary Visit Worksheet

#### Tour of the Facilities

**Preliminary Visit Worksheet - Tour of the Facilities**

Tour facilities and ensure that the following activities have occurred or that the following items are in place (have a current version of the Self-Study Manual and the Handbook of Accreditation available as a reference during the visit):

1. Ensure informal introductions have been made with faculty and staff *
   - Yes
   - No

2. Become familiar with the layout of the main campus and the location of all other campuses, if any *
   - Yes
   - No

3. Check current institution license (non-public institutions only) *
   - Yes
   - No

4. Spot check signage (e.g., exits, posted evacuation routes), equipment (e.g., reasonable accessibility to up-to-date first aid kits, fire extinguishers, eye/face wash stations [if stations are mandated]), and the physical facilities, in general *
   - Yes
   - No

5. Spot check media services *
   - Yes
   - No

6. Spot check records and records storage (Standard 10: regarding preserving and protecting student coursework, testing, and records are provided by the use of storage devices, duplicate physical or digital records, security files, or other measures that ensure both the preservation and security of the records from fire, theft, vandalism, and other adverse actions) *
   - Yes
   - No

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### Institutional Advisory Committee

**Preliminary Visit Worksheet - 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
Financial Statements

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

Permanent Accreditation

Permanent accreditation file has been reviewed and contains the following:

1. Copy of all substantive correspondence with COE (e.g., letters related to accreditation, reaffirmation of accreditation, substantive changes, and official actions of the Commission).

   - Yes
   - No
   - N/A

2. Copy of the last Self-Study Report.

   - Yes
   - No
   - N/A

3. Copy of the last accreditations visiting team report and all other team reports since the last accreditation visiting team.

   - Yes
   - No
   - N/A

4. Copy of the institution's responses report for the last accreditation team (if applicable) and all other response reports to visiting teams since the last accreditation visiting team.

   - Yes
   - No
   - N/A

5. Copy of all substantive change applications since the last accreditation visiting team.

   - Yes
   - No
   - N/A

6. Copies of all annual reports (including all supporting documentation) since the last accreditation visiting team, if applicable.

   - Yes
   - No
   - N/A

7. For Non-public institutions: Copies of all annual audited financial reports since the last accreditation visiting team, if applicable (RENDERS the institution demonstrates financial stability through submission of the most recent audited financial statements that reflect a minimum, unaudited score of 1.61).

   - Yes
   - No
   - N/A
The following team requirements have been discussed with the institution’s chief administrative officer:

1. Individual computer and internet access for each team member, and software requirements for team report software (Firefox internet access required)
   - Yes
   - No

2. Printer *
   - Yes
   - No

3. Office Supplies (see list in Guidelines manual) *
   - Yes
   - No

4. Trash can *
   - Yes
   - No

5. Paper shredder *
   - Yes
   - No

6. Tables and Chairs *
   - Yes
   - No

7. Ensure that the workroom does not use cameras or any other recording devices during the time of the preliminary or the accreditation visit to record any team interactions or team activities in the workroom or in any spaces *
   - Yes
   - No

8. Directory or listing of institutional faculty, staff, and administration to assist team in identifying school contacts *
   - Yes
   - No

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
   - No
### Conditions and Standards

Conditions and Standards check sheets have been examined and the following has been discussed with the institution's chief administrative officer:

1. Remind the institution to also provide the self-study exhibits for the Conditions Check Sheet *
   - Yes
   - No

2. Remind the institution to retrieve and use the most current versions of the documents from the CDE website *
   - Yes
   - No

3. Remind the institution that all plans and procedures must be written, evaluated, and in use *
   - Yes
   - No

4. Remind the institution that the following must be kept on file from one accreditation team visit until the next. All documents will be prepared as exhibits: Institutional Advisory Committee Agenda and Minutes; Occupational Advisory Committee and Minutes; Employer Verification Forms; All Plans; Records of Student Refunds; Grievances; Financial Reports; Copies of Promotional and Advertising Materials (Must be kept on file for 3 years). *
   - Yes
   - No

5. Is the institution prepared to host a virtual visit using a working platform for large document file sharing and a virtual communication platform? (If no, contact the appropriate CDE staff member) *
   - Yes
   - No
   - N/A

### Programs

COE-approved programs have been confirmed and the following has been determined: [Refer to Team and Staff Procedures for Processing Program Inconsistencies for Schools Hosting Accreditation Visits Worksheet]

1. New programs added? *
   - Yes
   - No

2. Programs deleted? *
   - Yes
   - No

3. Programs not enrolling students for the past 365 days have been deleted from the approved program list *
   - Yes
   - No
   - N/A

4. The institution has demonstrated that appropriate documentation relative to program modification hours (course prep/homework hours) is available for review by the visiting team. *
   - Yes
   - No
   - N/A

5. The institution has demonstrated that appropriate documentation relative to VSOL programs is available for review by the visiting team (See the Handbook of Accreditation and the Policies and Rules of the Commission for detailed policy requirements). *
   - Yes
   - No
   - N/A
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