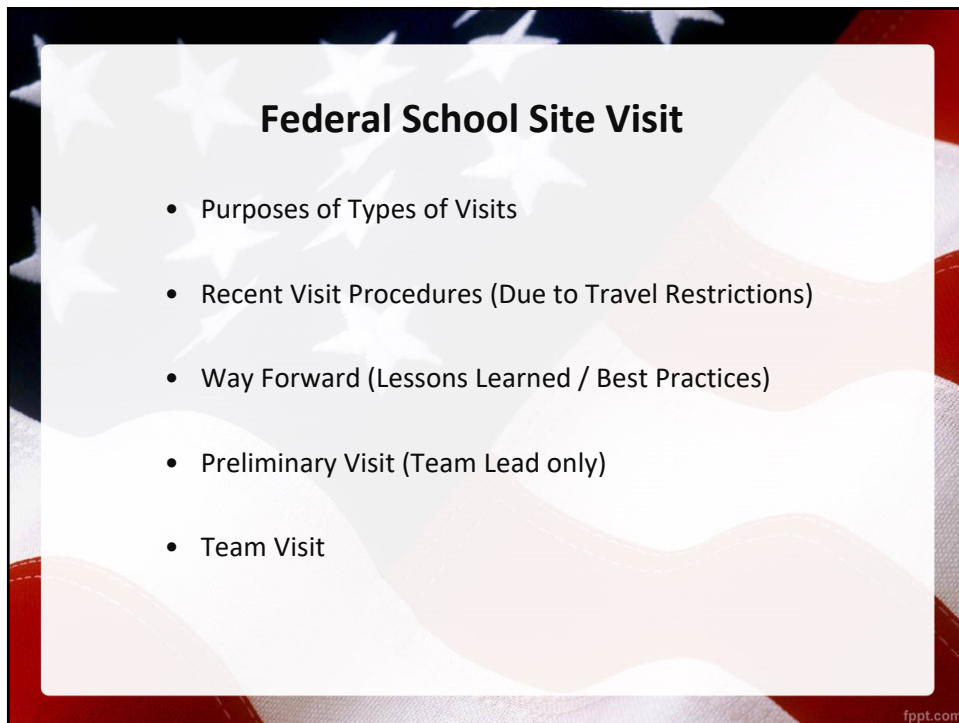




1



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Visits

- Purposes – under normal circumstances
 - Preliminary Visit
 - ✓ Ensure Organization is ready for Site Visit
 - ✓ Team Lead can take burden off of Team Members
 - Team Site Visit
 - ✓ Exhibit Review
 - ✓ Interviews
 - ✓ Facilities Tour

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Team Members

- Team Members
 - ✓ May have to take personal leave to participate in the Visit
 - ✓ May have to travel on Sunday to reduce amount of personal leave taken
 - ✓ Must front the cost of travel, lodging*, meals, other expenses
 - ✓ Are reimbursed by COE for exact cost (based on receipts) – no per diem
 - ✓ COE Policy - No Invitational Travel Orders (Team Members responsible for own travel arrangements)
 - ✓ Depending on Visit – members may be away from work for 2-5 days
- Benefits – what's in it for them?
 - ✓ Satisfaction of knowing they helped -
 - Schoolhouse self-examination process as colleagues, team mates, and peers (not inspectors)
 - Improve overall training – quality of graduates
 - ✓ Able to bring back Best Practices to their own organizations
 - ✓ Professional Development
 - ✓ Pat on the back

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Visits

(COVID era / March 2020 – July 2021)

- Virtual – all aspects (preliminary visit, report/exhibit reviews, interviews, facility tours, etc.)
- Platform
 - ✓ Whichever worked and was agreed upon by the institution
 - ✓ MS Teams, Zoom (personal computer/phone/iPad), etc.
- Exhibits
 - ✓ Sent in any manner agreed upon by both parties
 - ✓ CD (snail-mail, FEDEX, USB stick, etc.)
 - ✓ File Transfer (SAFE [<https://safe.apps.mil>], TeamBeam, etc.)
- Facility Tours – live streaming or videos (pre-recorded)
- Length of “Visit” – ~1 to 1.5 Days

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Visits

(COVID era / March 2020 – July 2021) continued

- Boots on Ground (after travel resumes)
 - ✓ DOE Requirement
 - ✓ Team Lead +1 Team Member
 - ✓ Prior to final (re)affirmation by COE Commission
 - ✓ Checklist forthcoming from Commission
 - ✓ Few hours on ground

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Visits

(August 2021 – Moving forward >>>)

- **Based on Lessons Learned from Virtual Visits**
 - ✓ COE's plan to return to "normal" beginning in August
 - ✓ Regular In-Person Team Site Visit (Pre-COVID)
 - ✓ Virtual Team Site Visit Optional (Voluntary – School's discretion)

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Visits

(August 2021 – Moving forward >>>)

- **Preliminary Visit – Virtual (Optional)**
 - ✓ Based on its purpose
 - ✓ Time and cost savings for both School and Team Lead
 - ✓ Integrity of process maintained (if not strengthened)
 - ✓ Mitigates time-on-station exposure risks

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Visits

(August 2021 – Moving forward >>>)

- Exhibits – reviewed in-advance (Voluntary – School’s Discretion)
 - ✓ Shortens the in-person visit by an entire day or more
 - ✓ Saves school money and team members time
 - ✓ Allows for a more thorough review – adds to integrity of process
 - ✓ Mitigates time-on-station exposure risks

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Visits

(August 2021 – Moving forward >>>)

- Hybrid Visit
 - ✓ Voluntary but may not always be possible or practical
 - ✓ At least two members on-site during Team Visit
 - ✓ One or more members – completely virtual
- Benefits of Hybrid Visit
 - ✓ Save School money
 - ✓ Makes Team Member participation possible
- Cons of Hybrid Visit
 - ✓ Virtual Platform (i.e., connectivity)
 - ✓ Time/Effort on part of School

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Preparing for Site Visit

- Attend COE Self-Study Workshop
 - ✓ 6 to 18 months **before** site visit
- Open comms with Team Lead ASAP
 - ✓ Information about school
 - ✓ Concerns
 - ✓ Ideas
 - ✓ Questions

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Timeline


<u>NLT</u> # Days Before Site Visit	Mandatory Timelines & Key Events (Minimum Requirements)
60 Days	Final <u>Draft</u> of Self-Study Completed (98% complete) Sent to Team Leader for review
45 Days	Team Lead - Preliminary Visit
30 Days	Travel and Accommodations Confirmed (e.g. Hotel Reservations, transportation, etc.)
20 Days	Send Final Self-Study to COE and Team Lead (who forwards to team members)
Day 0	Travel Day
Day 1 *	Introductions and quick tour of facilities / Team works UTC
Day 2 *	Final Team work / Time and location for Exit Brief should be flexible – most likely in the morning

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Preliminary Visit (Virtual)

Send the following documents for Review Prior to Visit Date:

- FTE Calculations
- Institutional Advisory Minutes (sample)
- Annual Curriculum Reviews (sample)
- School (Student, Staff, & Faculty) Handbooks, Brochures, etc.
 - ✓ All must align with identical information
- Permanent Accreditation File
 - ✓ All institutional correspondence with COE
 - ✓ Last Self-Study
 - ✓ Last accreditation visiting team report
 - ✓ All annual reports since last site visit
 - ✓ All institutional responses, if applicable




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Preliminary Visit (Virtual)

Send the following documents for Review Prior to Visit Date:

- Requested Exhibits (spot check)
- Self-Study Workshop Attendance Confirmation
 - ✓ Within the past 6 to 18 months
- Photo/Video showing the proper Display of COE Accreditation Certificate




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Preliminary Visit (Virtual)

Send the following documents for Review Prior to Visit Date:

- Notice in appropriate training website/social media regarding (re)affirmation of accreditation
- Strategic Plan
- Grievance Policy
- Student Record(s) (spot check)



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Checklist for Preliminary Visit

Items to discuss during the Preliminary Visit

- Confirm that Classes are in session for the dates scheduled for the team visit
 - *Avoid scheduling when local festivals, holidays, or other events are occurring during that time in the surrounding community that may make housing, transportation, or other event planning for the team difficult*

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Checklist for Preliminary Visit

Items to discuss during the Preliminary Visit

- Remind school that Self-Study is to be transmitted to the *Commission* 20 days before visit
- Confirm Hotel reservations
 - Centrally located in a safe, clean area (Typically Marriott or Hilton)
- Confirm Transportation arrangements
 - **Team Leader can rent a vehicle** (if school desires)
 - Arrangements made to get team members from airport to hotel and **back again**. Plans to get team to and from dinner & social function
 - Transportation to school and back to hotel each day
 - Transportation to airport (or hotel) after Exit Report
 - Transportation arranged for travel to branch and extension campuses
- Restaurants and other facilities identified

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Checklist for Preliminary Visit

Items to discuss during the Preliminary Visit

- Team Workroom:
 - MUST be [off-limits](#) to institutional faculty/staff during team visit
 - Furnished appropriately for number of team members
 - Well-lit with access to a phone and printer
 - Computers with Internet access (Chrome or Firefox browsers)
 - ✓ Personal computers and phones – school rules/requirements?
 - ✓ Access to Electronic Exhibits

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Checklist for Preliminary Visit

Items to discuss during the Preliminary Visit

- Team Workroom (continued):
 - Have IT personnel available to keep the team work moving
 - Possible Amenities
 - Room should allow water at a minimum
 - Team will most likely eat lunch in the workroom (Possible that they may request someone to bring in sandwiches to allow the team to make the best of their time)
 - Refreshments in the team workroom:
 - Are not required – ~BUT~
 - Option - Team Leader can purchase water for the team at a local store (s/he will be reimbursed when filing final voucher)

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Team Visit

Items suggested to have available on-site for team members:

- School (Facilities) map
- Staff and faculty directory (with pictures if possible)
- List of Classes in session, their room numbers, training topic, instructor names and any other information necessary for classroom observation
- Students will be interviewed *ad hoc* thus a list of the break times and break areas is helpful
- Optional Name tags prepared for key Faculty and Staff and Team Members

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Typical Site Visit Agenda

Day		POC / Room
Day 0 – COE Team Travel Day (Sunday)		
16:00	COE Team meeting	COE team only / Hotel
17:00	Optional Evening welcome and social	PLACE TBD
Day 1		
07:30	Arrival / coffee, orientation/Optional Breakfast Social	TBD (Team Workroom)
08:00	Welcome & Opening remarks and School Introductions (Recommend Name tags for key personnel if possible)	CAO, ALO, or Representative
08:15	COE Team Introductions and Review of Expectations	Team Leader & Members
08:30	Quick Tour of School Facilities (Tour will end at COE Workroom)	CAO, ALO, or Representative
09:00	Team will begin their review and continue work until complete	Team / Workroom
Day 2		
07:30	Team continues work until complete	Team / Workroom
TBD	Exit Report	Team Leader / TBD by CAO

Note: **Every School is Unique!** The actual visit agenda and how the team approaches the task is a mutual agreement between the team leader and the CAO/ALO

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Other notes

Group interviews

- Student interviews may be done as a class or in a small group
 - ✓ Students are more comfortable in a group vice individual
 - ✓ Saves TIME! With less interruption
 - ✓ Gives a better overall look at the student population
- No substantive changes 6 months prior to the scheduled dates of the team visit

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Exit Briefing

Be ready & flexible for the Exit Briefing

- Final Agenda item
- Rather mundane and anticlimactic
- One-way event – Team Members read Findings and/or Commendations for each Standard
- Commander determines who will attend and location of briefing
- No discussion regarding Exit Briefing permitted
- Team Members will depart the school immediately following briefing

- **Best Practice** – Pre-brief the Commander to preclude any “surprises” in front of cadre, staff, or faculty

NOTE: The Final Team Report only provide recommendations to the COE Commission – the final decision is theirs

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Keys for Success

- Use the 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 Visit
- Finalize all plans with the Team Lead far in-advance of Visit
- Prepare the Students, Staff & Faculty on what to expect from Team
- Ensure the Host POC is available at all times during Team Visit
- Adhere to Team Visit schedule as much as possible

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