How to Host a Visiting Team

Annual Meeting Nov. 8-10, 2022
Carrie Fife, Director of Adult Education
Pickaway-Ross Career & Technology Center

What We Will Cover in the Workshop

1. Before the Preliminary Visit
2. The Preliminary Visit
3. Before the Team Visit
4. The Team Visit
We will also address:

- Finances
- Travel
- Meals
- Hotel
- Workroom

What is my responsibility?

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
Before the Preliminary Visit

**Scheduling a Team Visit**
- Email from COE Office about hosting a team
- Choose a Date
- Confirm Dates
- Receive Material from COE
- Receive Team Leader Name
- Receive Team Roster

**Five Conditions**
- Refer to front of the Self-Study Manual for conditions that must be met prior to hosting a team visit.

**Begin Self-Study**
- Allow for adequate time to prepare all documents
- Timetable—Preliminary Visit at least 30 days prior to team visit
- Complete Self-study to team leader 60 days prior to the preliminary visit.

**Prepare Exhibits**

*Suggestion:*
Try to complete as many of the exhibits as you can before the preliminary visit.

At least conditions, two standards and two programs

**Plan Your Visit**
- Select Hotel
- Opening Event
- Transportation
- Finances
- Meals

**Schedule the Preliminary Visit**
- Communicate with your Team Leader
- Confirm Dates of Preliminary Visit
- Make Hotel Reservations
- Send Self-Study to Team Leader
- Prepare Materials for Preliminary Visit
During 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

Prepare the following Materials:

- Draft of Self-Study
- Exhibits
- Self-Study Certificate
- Newspaper and/or Media Announcement
- Copy of Current License (if private)
- Current COE Program List
- List of Campuses
- Map of School
- Financial Reports
- Last CPL Report
- 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

❖ Use your team leader as a resource.

❖ The team leader is there to help you and to make sure your institution is ready for the team visit.

❖ Finalize all plans for the team visit with the team leader during the preliminary visit.

❖ Communication is the “Key”.

Number of Team Members

❖ Number of Programs
❖ Size of Faculty and Staff
❖ Number of Students Enrolled
❖ Number of Campuses
❖ Distance between Campuses

Tip: Refer to your last team visit report. Has anything changed on your campus since the visit? (For example: number of programs or number of off-site locations)
Hotel Accommodations

Hotel selection will be a mutual decision between the team leader and the school officials.

Team leader will approve hotel on the preliminary visit.

- Clean
- Safe
- Centrally Located
- Meeting Space
- Restaurant
Transportation

- Each team member is responsible for making their own travel arrangements from their home to the institution (airport).

- During the visit, the school is responsible for transportation:
  - To and From the Hotel
  - From Hotel to School Each Day
  - To and From Social Functions
  - To Visit Off-Campus Facilities
  - To Visit Clinical Sites

- Provide transportation back to the airport at the end of the visit

Institution may provide transportation by:

- Using School Vehicles
- Using Personal Vehicles
- Renting Vehicles
Meals and Social Function

Social Function

The purpose of this function is to provide an opportunity for members of the institution’s staff to become acquainted with the members of the visiting team.

Meals and Social Function

- Breakfast
  - At Hotel
  - School May Provide in Workroom
- Lunch (Usually a working lunch)
  - Buffet
  - Culinary Art Program
  - Ordered from Local Restaurant
- Dinner
  - One night just Team Members
  - One night with School
  (Team leader will decide and discuss with school at the preliminary visit).
Workroom

What is the purpose of the workroom?

- Complete Team Report
- Team Meetings
- Review Exhibits
- Take Breaks

Choosing the Room

- Centrally Located
- Large enough to accommodate team
- Secure and Clearly Identified
- Off limits to faculty and staff

Contents

- Tables for team members to work
- Computers or laptops
- Printer
- Access to Phone
- Exhibits
- See Self-Study Manual for Supply List
EXHIBITS IN WORKROOM

*Important:* Exhibits are digital!
It is important to have computers or laptops with internet connections (Firefox or Chrome) available to team members.

Workroom

*Important:* Be sure to have a printer available to the team.

Have an IT Person on standby during the visit to assist team if needed or troubleshoot any problems.
Provide Meals and Snacks for Team During the Day

The team will use the workroom to review your exhibits and complete the Team Report.
Use the workroom to display information about your school, maps of your campus, or a pictorial directory of your faculty and staff.
FINANCES

• Team members must make their own travel arrangements and be prepared to pay for travel, food, and lodging for the duration of the visit.

• School may arrange for direct billing of hotel accommodations. Discuss with team leader on preliminary visit.

• School may pay for meals during the visit. Discuss with team leader on preliminary visit.

Before the Team Visit

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**Notes:**
- [Note 1]
- [Note 2]
- [Note 3]

[11/1/2022]
Before the Team Visit

Prepare and Mail the Team Member Packets

- Welcome Letter or Email
- Request Travel Arrangements
- Contact Person at School—Cell Phone Number
- Request Any Special Dietary Needs
- Self-Study—Standards and Program Supplements
- School Catalogs and Brochures
- Website Address
- Student Handbook and Staff Handbook
- Faculty Directory with Pictures, if possible
- Hotel Literature
- Local Information and Map of Area
- Miscellaneous Items

Before the Team Visit

Check Again These Items

- Accreditation File
- All Exhibit Files (No Blank Forms)
- Plans, Procedures, and Evaluations (No Blank Forms)
- Publications
- Advisory Committee Minutes
- Employer Verifications
- Program Curriculum Materials
- Media Services
- Walk through of facilities checking for safety and emergency items
Before the Team Visit

Prepare Your Staff and Faculty

- What to expect and what will be expected from them during the visit
- Make sure everyone has read the self-study
- Make sure everyone is familiar with the Checksheets
- Answer any questions they may have about the visit or the process

The Team Visit

During the Visit

What do we do while the team is at our school?

BUSINESS AS USUAL
The Team Visit

EXIT REPORT

• Time of Report
  Decided by Team Leader and Chief Administrative Officer

• Who will attend the report?

• Where will the report be given?

• Conclusion of report—Be sure to get team members to hotel and airport

GIFTS

Team members must not accept gifts, favors, or services from the institution.

Souvenirs are permissible but should be restricted to inexpensive items representative of the institution or its geographical area.

Suggestion: Offer to mail items back to the team members home or institution.
QUESTIONS

Have a Wonderful Team Visit

And

Thank you for attending!

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