

COUNCIL ON OCCUPATIONAL EDUCATION

Guidelines for Accreditation Visiting Teams

2027 Edition

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Visiting Teams

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COUNCIL ON OCCUPATIONAL EDUCATION
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Preface

The intent of this handbook is to familiarize visiting team members and team leaders with those details necessary to conduct an evaluation of an institution hosting an accreditation visiting team. These guidelines were developed for the purpose of implementing evaluation procedures of occupational institutions. They have been revised and are subject to be revised in the future. Team members and team leaders are requested to suggest needed changes to the Executive Director of the Commission of the Council on Occupational Education for inclusion in later editions.

Team leaders, in the absence of a Commission representative, have the responsibility of making all decisions necessary to ensure an effective evaluation. In the event of a need to contact the Council office, the telephone number is (800) 917-2081.

This publication is also available on the COE website (www.council.org).

GUIDELINES FOR ACCREDITATION VISITING TEAMS

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Guidelines for Accreditation Visiting Teams

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The Responsibility of the Visiting Team

Team Member/Leader Certification

Anyone interested in participating in Commission team visits must be certified to do so. Certification is accomplished through attendance at Commission-sponsored workshops for the training of team members or team leaders, and usage of team reporting software. Team member and team leader workshops are offered at each Spring Accreditation Institute and Fall Annual Meetings of the Council. As needed, virtual team member and team leader training is also provided bi-annually by COE staff. Certification training for team members or team leaders must be renewed every three years.

Also, all team members and leaders must sign the Commission's Conflict of Interest statement before participating in site visits. (See Appendices for Conflict-of-Interest policy and statement.)

Primary Responsibility

The primary responsibility of the visiting team is to **observe** if the institution is in compliance with the policies and rules, and the standards and conditions of the Commission. The team will use the criteria in the Handbook of Accreditation (in hard copy or electronic formats) to document whether policies, rules, standards, and conditions are being met. As needed, the team will write items of concern in the team report in EDvera for every criterion not met. The Commission of the Council on Occupational Education retains sole and final authority to determine whether an institution is not in compliance with the accreditation. Findings of non-compliance shall not be determined by the Visiting Team, COE Fellow or COE Staff.

Commission Makes Final Decision

Accreditation cannot be granted by the visiting team. The Commission makes the final decision about the accredited status of an institution and only after reviewing the Self-Study Report, Team

Report, and the Institutional Response Report to determine if the institution is in compliance with the policies, rules, standards, and conditions. The Commission either grants accreditation, defers action and requests additional documentation, or denies accreditation.

Team Members as Evaluators

The team members are evaluators, not inspectors. As evaluators, they study the quality of the institution in the light of its stated mission using the policies, rules, standards, and conditions as the evaluation criteria. Through information obtained from interviews and documents, the team considers the (1) strengths, (2) weaknesses, and (3) approaches to the solution of any problems. The Self-Study Report is a primary source of information, but the team also examines the supporting documents (exhibits) used in compiling the Self-Study Report. The approach of the team to the evaluation should be objective and not biased or affected by practice at the home institutions of the team members or by personal prejudice. Throughout the visit, the team has the responsibility of assisting the institution in its growth and development.

NOTE: The Commission is not the enforcer of all legal obligations imposed by governments and their agencies. Example: The team will evaluate safety criteria applicable to the institution; however, the team will not determine if the institution follows the requirements of the Occupational Safety and Health Act or the Americans with Disabilities Act. Nonetheless, if the institution has been cited for not meeting a COE requirement, the team is to evaluate the institution as to meeting the part of the act for which the institution was cited.

Confidentiality

Team members are to respect the confidentiality of the Self-Study Report and all other institutional documents. The information contained in these documents is to be discussed only with team members or a Commission representative for official Commission purposes. Team members must not discuss the team visit or any items of concern with anyone other than team members or a Commission representative nor make any comments about the team visit or items of concern except in an official meeting with the staff of the institution.

The team should carefully avoid any statement in the Team Report or in the oral report to the chief administrator which predicts accreditation. Team members are not to prescribe solutions to deficiencies, only identify deficiencies in the items of concern.

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 geographic area.

Team Member Procedures

Preparation for the Team Visit

1. Preliminary Visit Exit Meeting

The COE Staff will assign team members and the team leader for each visit. Once the team leader receives the team roster, a welcome email should be sent to team members. Team leaders should remind team members not to make any travel arrangements until after the Accreditation Kick-off Meeting.

The Preliminary Visit Exit Meeting will be conducted by the COE Fellow (approximately three months prior to the visit). The COE Fellow will be on site for the Preliminary Visit Exit Meeting, and the Team Leader will be virtual. During this virtual meeting, the COE Fellow will introduce the team leader to the institution. The team leader should not contact the school prior to the Preliminary Visit Exit Meeting.

The COE Fellow will provide an overview of the institution and a summary of the observations from the preliminary visit. The team leader will discuss with the institution the logistics of the team visit and begin the development of a team visit agenda. During this meeting, the COE Fellow will transition (soft-hand off) the leadership of the visit to the team leader.

2. Accreditation Kick-Off Meeting

After the preliminary visit exit meeting, the team leader will contact the team members and arrange for a virtual meeting to discuss the logistics of the team visit including transportation and the member has access to their EDVera account. The meeting will include the team members, team leader, COE Fellow and a COE Staff member. The team leader will conduct the meeting, and the COE fellow and a COE staff member will be present as a resource for the team. Team Members should not book their flights until after the Accreditation Kick-Off Meeting has concluded.

3. Receive Materials and Access through EDvera

Team members will normally receive access to the Self-Study Report and supporting documentation (exhibits) such as catalogs, and other materials in the team report software in EDVera two months (60 days) prior to the visit. Supplementary materials will be available on the campus for use by the team, if needed.

Before arriving at the campus, members of the team should read the total Self-Study Report in the team report software in EDVera, other information provided by the institution, the Handbook of Accreditation, and the Guidelines for Accreditation Visiting Teams. Team members should give special attention to their specific assignments and corresponding standards of accreditation made in advance by the Commission staff or by the team leader. A team roster that identifies team member assignments will be available in the team report software in EDvera.

4. Make Travel Arrangements

Team members should not make travel arrangements before the Accreditation Kick-off meeting held by the team leader. This meeting will take place two months before the visit. During the meeting, the team leader will provide information about the team visit agenda, transportation, hotel, time of the accreditation entrance meeting and the accreditation exit meeting.

Team members must make their own travel arrangements (see Team Member Finances section of this manual). Team members must notify the chief administrator, team leader, and the COE staff of their plans via email.

Important: Do not make travel arrangements until you receive notice from the team leader during the Accreditation Kick-off meeting.

Team Visit

1. Team Conferences

Team conferences will be scheduled by the team leader during the visit so that the members can share their items of concern and observations. The team leader will provide the team members with a team visit agenda with team conferences scheduled. Through these exchanges, team members can confirm their impressions and determine additional areas that should be evaluated. The team will begin its visit with an initial conference, at which time the team leader will present an outline of activities for the entire visit. Customarily, there is also a brief conference of the team with the institution's chief administrator and/or staff members selected by the chief administrator at the beginning of the visit.

2. Conditions and Standards of the Commission

To provide consistency in the evaluation process, the Conditions and Standards criteria are in the team report in EDvera and the Handbook of Accreditation. These criteria will be used in evaluating or determining the institution's compliance with the conditions and standards. Criterion in Conditions covers requirements in Sections II-V of the *Handbook of Accreditation*. Criterion in Standards covers the criteria in Section VI of the *Handbook of Accreditation*. Every team member should be familiar with the *Handbook of Accreditation*.

Either **Item of Concern, No Item of Concern or N/A** must be checked after reviewing the exhibits that the institution has uploaded in EDvera for each criterion. In appropriate cases, **N/A** may be checked where the criterion is not applicable to the institution.

Conditions and Standards Criteria are available on the Council website (https://council.org/handbooks/) to reference in conjunction with the COE Team Report Software, as needed. Any data collected on the criteria for conditions and standards must then be entered into the team report software.

NO Items of Concern

For all items marked with no items of concern within the team report in EDvera, the team member must have institutional documentation that the team observed the institution was in compliance. For criterion having an item of concern response, the team must write an item of concern.
However, the team may want to write suggestions or commendations applicable to the criterion (see examples in "Example Visiting Team Report"). The team is encouraged to provide consultative assistance by writing suggestions. Justification for any suggestion must be specific and applicable.

Items of Concern

For all items marked 'Item of Concern' within the team report in EDVera, the team members must

not have found institutional documentation or inadequate documentation to verify compliance with the criterion. Items of concern MUST have a written narrative for any item marked item of concern.

Before any items of concern are written, the team observed that the institution may not be in compliance with a policy, rule, standard, or condition and that the necessary documentation has not been overlooked. When documentation cannot be found, the team must request the documentation from the institution's staff member responsible for the area in question. Items of concern must be written directly within the team report software in narrative form to describe the institution's non-compliance with the criterion that the team observed. The narrative provides a clear rationale for any items of concern.

When writing items of concern, make use of the terminology associated with the criterion in the conditions and standards (see examples in "Example Visiting Team Report"). Make sure items of concern clearly relate to the item marked item of concern. Normally, there will be one item of concern written for each one marked.

Compound Statements (Multi-Part Criteria)

Some criterion noted in conditions and standards are compound statements. These are also known as 'multi-part' criteria. If the team observed the institution is not in compliance with any part of the statement, "item of concern' must be checked. Only that part of the statement with which the institution is not in compliance will be addressed in the items of concern.

Standard 2

Standard 2 will be completed in the team report software in EDVera for each educational program at the main campus and all off-campus sites. Standard 2 for all programs will be included as part of the official team report submitted to COE.

3. Definitions

An ***item of concern*** *i*s a statement by the team that describes the circumstances during a site visit that indicate the institution is in not in compliance of a policy, rule, standard, or condition. Items of concern require that the institution address the item of concern and submit documentation assuring the Commission that the item of concern has been corrected.

A ***suggestion*** is defined as a statement written by the team pointing out improvements that might be made in an educational program or in the operation of some part of the institution to promote educational improvement. It is highly encouraged that the institution responds to suggestions; however, is not required to do so.

A ***commendation*** is defined as a statement written by the team describing an exemplary area of the institution observed by the team during the team visit. Commendations should not name individuals rather should describe how the institution has excelled in one of the standards.

4. Examining Institutional Documentation

Team members should prepare a list of materials and records that must be examined after arriving at the school. They must examine all documents which support each policy, rule, standard, condition, and standard two for each educational program. Documentation will be in the form of

exhibits prepared by the school for viewing by the team. Exhibits must be provided in electronic format and uploaded in the self-study report in EDVera. Student and personnel records in school files, curriculum materials used by instructors, and any other documentation not uploaded into the self-study report in EDVera may be requested in order to determine compliance with the policies, rules, standards, and conditions. Consider time constraints in governing the amount of time spent examining documentation; however, be thorough enough to be fair to the institution and to do a credible job as a team member.

5. Interviews

Team members must carefully plan interviews because site visit time is limited. Team members should prepare a list of people to be interviewed.

a. Mingle and talk with (1) students; (2) instructional staff; (3) administration; and (4) non-instructional staff of the institution *(see Suggested Techniques for Effective Interviewing)*.
b. Keep accurate notes.
c. Keep a list of titles of individuals interviewed (correct spelling of titles).
d. Complete interview forms for everyone interviewed.
e. Be professional and friendly.
f. Avoid providing updates to the institution regarding the status of the visit.
g. Should any critical problems arise, discuss them with the team leader or Commission representative.
h. Avoid discussing the team's activities with anyone other than team members. (Questions from the news media should be referred to the team leader.)
i. Avoid, "Where I come from, we do it like this."
j. Be a good listener.

6. Team Report

An official team report is completed in EDVera and submitted by the team to inform the staff of the institution and the Commission about the status of the institution as measured against its mission and the policies, rules, standards, and conditions of accreditation set by the Commission.

Any items of concern shall be written in narrative form and be as clear and concise as possible. Complete sentences should be used in every instance.

Names and the personal pronoun, such as 'I' should not be used in the report. The report must be considered a report of the entire team and receive concurrence of the entire team before it is considered complete. Remember, the report is a TEAM report.

Each team member must complete the parts of the team report in EDVera he/she is assigned by the team leader which may include:

k. Completed Conditions and/or Standards

l. Completed Standard 2 for each Educational Program assigned
m. Appropriate items of concern and suggestions
n. Personal Interview sheets *(see form in Appendices section)*
o. Documentation upload, if applicable. In some cases, the report may warrant adding documents and/or photos.

7. Accreditation Exit Report

The team will make an informal oral report to the chief administrator and/or key personnel at the end of the visit. The team must avoid any suggestions or predictions about accreditation.

Team Member Finances

Expenses incurred by team members are reimbursed by the Council on Occupational Education. Team members must make their own travel arrangements and must be financially prepared to pay for travel, food, and lodging for the duration of the visit. The actual expenses of each team member are reimbursed in accordance with the Council on Occupational Education Reimbursement Policy.

1. Original Receipts

Original receipts are required. Scan and submit all receipts for airline travel, car rentals, hotel bills, meals, and all other expenditures incurred during the visit.

2. Transportation

Travel by common carrier (airplane, train, bus, boat, etc.) will be reimbursed at the normal economy rate or actual cost, whichever is less, plus the necessary expense to and from the place of departure of the common carrier. Plane reservations should be made at the earliest date possible in an attempt to obtain the lowest priced ticket available. While a few team members are scheduled only a day or two before they actually travel, most are scheduled weeks in advance.

Note: Travel arrangements are made after the team leader's accreditation kick-off meeting. If issues or concerns arise, then the team leader will consult with COE staff.

Important: Do not make any arrangements until after the Accreditation Kick-Off Meeting.

3. Personal Auto and Car Rental

Team leaders and members should contact the Vice President of Evaluation to request approval to drive to the team visit. Personal automobile usage is authorized at the current IRS-approved rate by the most direct route. The maximum allowable reimbursement, including enroute expenses, may not exceed the published economy air fare to and from the site of the meeting. When the economy air fare is less than the amount requested on an expense voucher from use of a personal automobile, the difference will be subtracted from the requested amount. All documentation used to determine the cost of travel should be included with the COE Expense Voucher, which can be found at https://council.org/applications-and-forms/.

4. Non-reimbursable Expenses

Non-reimbursable expenses include items not directly related to Commission business, such as, telephone calls, lodging and meals for family members and guests, movies, entertainment, etc. If you are authorized to sign the hotel bill upon check-out, pay for non-reimbursable expenses at that time, and have the hotel deduct this from the final bill sent to the Council. In other cases, non-reimbursable expenses are to be deducted from the total of expenses on the COE Expense Voucher.

5. Accommodations

It should be the host institution's choice as to where team members stay, provided the facilities are clean and safe. Team members do not have the option of choosing more expensive quarters unless they are willing to pay the difference.

6. Guests

While it is sometimes appropriate for a spouse or other family or friends to accompany a team member on a visit, these individuals must not participate in team activities, nor should any of their expenses be included on the *COE Expense Voucher*. The team member should assure the host that guest expenses are being paid separately.

Team Leader Procedures

Preparation for the Team Visit

1. Team Leader Information

Information for the team leader, including team report software access to the institution's self-study report, the name of the assigned COE Fellow, and the team roster will be made available to the team leader by Council staff. Resources such as the Handbook of Accreditation, Criteria for standards and conditions are located in the Handbook of Accreditation, Policies and Procedures, and Interview Forms are available on the Council's websites under the Resources Menu.

2. Team Member Information

All individuals who participate in team visits must have an active account in the COE EDvera accreditation management system. This system provides access to the team report software for each institution visited. A link to the team report software file for the institution to be visited is placed in the EDvera account of each team member under the 'Applications' tab.

The team report file link is provided when all members on the team roster have been confirmed and the roster is complete. Additional information will be provided by COE staff, COE Fellow, the team leader, and the institution.

Team leaders should advise all team members to notify the chief administrator, team leader, and COE staff of their travel plans via email or telephone **after the Accreditation Kick-off meeting.**

3. Schedule

The schools being evaluated have spent many months preparing for the team visit. The number of

team members has been selected in proportion to the size and complexity of the school. The amount of time noted within the following section (C. Team Visit) is the very minimum required for a comprehensive compliance evaluation.

No effort should be made to accelerate the accreditation visit schedule. Should the team leader feel that the length of the team visit should be changed, the team leader should contact COE staff.

Prior to Team Visit

Prior to the team visit, the team leader will communicate with the COE Fellow. After the Preliminary Visit Exit Meeting, the team leader will communicate with the institution to confirm details about the team visit. The following information provides a guide for the team leader to follow prior to the team visit.

INSTITUTIONAL INFORMATION

Institution Name:

Main Campus Address:

Additional Campus Addresses:

Institution's Chief Administrator Name, Email and Number:

Institution's COE Liaison Name, Email and Number:

Institution's On Ground Contact Name, Email and Number (if different than the COE Liaison):

Institution's Additional Details (e.g., Number of Campuses, Distance Between Campuses, Number of Students, Number of Programs, etc.):

Date of Accreditation Visit:

COE Fellow Name and Contact Information:

TRAVEL INFORMATION

Hotel Name:

Hotel Address:

Hotel Phone:

Transporter(s) Name(s):

Transporter(s) Phone Number(s):

Transportation Mode:

Return the Conflict-of-Interest Form

PRELIMINARY VISIT EXIT MEETING

The assigned COE Fellow will conduct a preliminary visit 90 days prior to the team visit. At the conclusion of the preliminary visit, the COE Fellow will conduct a virtual preliminary visit exit meeting. This meeting will be attended by the institution, the COE Fellow, the team leader, and a member of the COE staff. After the COE Fellow discuss the observations from the preliminary visit, the meeting will be transitioned to the team leader. The Team Leader (virtually) will discuss and coordinate the following logistics with the institution's Chief Administrator (CAO) or designee:

- Names/Number of People on the Team
    - Discuss the number of team members
    - Discuss the team members program assignments
    - Discuss the team members' standards assignments
- Travel
    - Discuss means of travel.
    - Discuss the itinerary since some team members may need to come in on Sunday night or leave on Friday due to travel and schedule.
- Accommodation
    - Discuss the hotel for the visit
    - Discuss billing- direct bill or individual's pay
    - Discuss food eaten at the hotel- charged to room?
    - Confirm who the campus contact is for the team member travels
    - Meeting room at the hotel for the first team visit
- Transportation
    - To and from airport transportation accommodations
    - To and from the hotel to the institution transportation accommodations
    - Off-campus site visits
    - Any clinical sites to be visited
- Work Room Expectations & Requirements
    - Quiet and private area (Make sure the room is large enough for the team to work comfortably with tables and chairs.
    - The workroom is off-limits to faculty and staff during the visit.
    - Room should be cleaned after the team leaves each day
    - Availability of onsite technical assistance
    - Office supplies such as post-it notes, shredder, trash cans, paper, pens, staplers, paper clips, etc.
    - Individual computers or laptops and internet access for each team member, and software requirements for team report software (Firefox internet access required)
    - 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 space.
    - Directory or listing of institutional faculty, staff, and administration to assist team in identifying school contacts.
    - Last Self Study and Campus Response to the last Team Visit

PRIOR TO ACCREDITATION KICK-OFF MEETING

Listed below are action items that must occur before the kickoff meeting. This virtual meeting should take place two months prior to the team visit.

1. The Team leader will review the final draft of the institution Self-Study that uploaded in

EDvera (available 60 days prior to the visit).

2. The Team Leader should note if the institution has added, deleted, or is teaching any programs since the last accreditation visit.
3. The Team Leader should review the Institution's Catalog, Student Handbook, Staff Handbook, Brochures, Websites URLs, and any publications used for recruitment. Electronic access is acceptable.
4. The Team Leader should develop the following agendas for the Accreditation Visit.

ACCREDITATION KICK-OFF MEETING

During the virtual Accreditation Kickoff Meeting, the Team leader will discuss the following with the Team Members and Fellow:

· Team Leader will Chair the Meeting and Review
· Preliminary Visit Highlights from the Team Leader (Fellow, if questions arises)
· Travel
· Accommodation
· Transportation
· Work Room
· EDvera
· Visit Assignments
· Interviews Requested
· Review Accreditation Visit "FINAL" Agenda

Also, the Team Leader should review and discuss the process of reviewing student records, refunds, and grievances during the visit. Note: It helps to get the names of the campus contacts for Standards 3, 7, and 10.

The Team Leader will verify with the COE Fellow that the facility operates in a safe environment (e.g., exit signage, posted evacuation routes, etc.), equipment (e.g., Reasonable accessibility to up to date first aid kits, fire extinguishers, eye-wash stations (if stations are mandated), and emergency plans.

Please provide a narrative of the Preliminary Visit Exit Meeting and the Accreditation Kickoff Meeting with the details mentioned above. This report must be submitted to Ms. Susie Hill at susie.hill@council.org no later than 10 days after the Accreditation Kickoff Meeting.

TEMPLATES FOR AGENDAS

Sample agendas to be utilized for the following will be provided as a resource:

- Accreditation Visit Kickoff Meeting
- Visiting Team Meeting
- Accreditation Visit Entrance Meeting
- Accreditation Visit Exit Meeting
- Accreditation Team Visit

Team Visit

1. Day One of Team Visit

Accreditation Entrance Meeting of the Team at the hotel (Arrival Day: conference time suggested is approximately 4:00 p.m.; however, the first conference can be at any time after noon of the arrival day.)

a. Introduce each team member.
   (1) Record team member room numbers and cell phone numbers
   (2) Note departure time of each member
   (3) Make sure all team members have name tags
   (4) Introduce Assistant Team Leader
b. Review team member assignments and make any necessary rearrangements. Discuss the team schedule and work to be performed by the team.
   (1) Encourage each member to develop a work plan and schedule
   (2) Discuss transportation needs and schedule visits to off-campus facilities
   (3) When possible, plan to have meals as a group and discuss business during meals
c. Brief the team members about the institution and the Commission's policies, rules, standards, conditions and criteria as if they have never been on a visit.
   (1) Remind team members to review all materials; such as,
      (A) Institution's Self-Study Report
      (B) Handbook of Accreditation
      (C) Guidelines for Accreditation Visiting Teams
      (D) Exhibits
   (2) Review conditions and standards, and the procedures for writing items of concern
   (3) Emphasize that team members are not to discuss items of concern with school personnel (advise members to be careful of statements that might leave an impression of accreditation or non-accreditation)
   (4) Distribute Personal Interview sheets and review interviewing techniques
      (A) Mingle with school personnel and students
      (B) Make certain all school personnel are interviewed by at least one team member
      (C) Make a list of the names (spelled correctly) and titles of each person interviewed
      (D) Record names and titles on interview sheets
   (5) Establish team leader's office hours
   (6) Explain how meals and room expenses will be reimbursed

2. Social Functions (Optional)

Members of the institution's staff should become acquainted with the members of the visiting team as soon as possible. This task may be accomplished by way of several methods: guest

- A dinner (a more formal event);

- A reception (a more casual event with beverages and snack items available);
- Breakfast (buffet or continental); or
- An opening meeting for the institution staff and team members.

These methods are merely suggestions. In no way does the Commission prefer one method over another, nor does it encourage the institution to incur excessive expenses for this event. The event should take place early on during the team visit. The Commission does, however, discourage the serving of alcoholic beverages at this event.

The team leader should encourage the institution to introduce the team to all special guests or dignitaries attending this event.

It is not uncommon for the team to have working meals. Therefore, the institution should not make plans to entertain the team every night of the visit.

If a formal event is agreed upon by the institution and the team leader, planning for the event should include the following:

a. Seating
   (1) Team leader should become aware of any visitors such as board members, state staff, or senior officers attending the dinner conference
   (2) Team leader and Commission representative should dine with or very near the Chief Administrator of the institution

b. Introductions
   (1) Introduce team members or have team members introduce themselves including a brief statement of experience
   (2) Team leader and/or Commission representative should make a few remarks
      (A) Express appreciation for effort expended
      (B) Express shared interest in importance of occupational education
      (C) Briefly review accreditation process and what to expect
      (D) Charge all personnel with ensuring a comprehensive and mutually rewarding visit

After the event, the team leader should be available to talk with team members.

3. Day Two of Team Visit – Programs

a. Morning
   (1) Review procedures, work responsibility, assignments
   (2) Review schedule
      (A) Set team conference times to share items of concern and observations
      (B) Determine schedule for night classes
   (3) Allow chief administrator to address the team briefly
   (4) School tour

b. Mid-morning

   Institution Evaluation (Team starts work on evaluating accreditation standards)

Program Conditions and standards criteria

(1) One set of Standard 2 criteria for each individual program should be completed in the team report software

(2) The assistant team leader is responsible for coordinating with the team members to ensure that they enter program data and that the team collaborates to write any items of concern, suggestions or commendations. It is the responsibility of the assistant team leader to review all standard twos in the team software.

(3) Programs with work-based activities that include structured learning events that occur outside the classroom and involves the public (e.g., clients who are served by the institution in cosmetology clinical or automotive technology settings), which are components of the educational program(s) (e.g., externships, internships, clinical experiences, industrial cooperative education, and similar activities) must be evaluated by the team.

c. End of the Day

(1) Review the progress and restructure assignments if necessary

(2) Remind team of schedule for team members returning if the institution has night classes

(3) Have team members enter data for each program into the team report software

(4) Determine if a private session with the chief administrator is necessary

4. Day Three of Team Visit – Standards

a. Recap Programs

Review any items of concern written for programs and ensure that the team concurs with the report. Items of concern are only written once for a standard violation, however, that violation may occur in multiple programs.

b. Standards

1. Criterion for each standard must be completed in the team report software.
2. Remind team members that if there is an area of concern, they **should** request additional documentation from the school. The institution **should** be provided with a reasonable amount of time to retrieve the documentation; however, at the time of the site visit, the institution is providing a snapshot in time. **Therefore, no changes, modifications, additions, or deletions can be made to the institution's documentation**.
3. Emphasize to team members that any plan must be written, evaluated and in use.
    a. Must see written plan—not verbal explanation.
    b. Plans must be individualized for off-campus sites.
    c. Must see evidence that plans are in operation and that procedures are currently being followed.
4. Make sure that the team member assigned Standard 3 (Program Outcomes) verifies accuracy of completion and placement and

licensure exam statistics reported. For completion, see backup documentation (names and transcripts). For placement, acquire names and phone numbers of a sampling of employers of students placed and call the employers. For licensure, review reports from the state licensure exam agencies and school records.
Note: Benchmarks for minimally acceptable percentages of completion, placement, and licensure exam pass rates can be found within the Council's annual report software and on the Council's website – www.council.org.)

5. Make sure that the team member assigned Standard 7 (Financial Resources) examines the financial statements carefully to ensure that the school meets each of the criteria for financial stability. If there is a question, discuss with team leader and/or contact a COE staff person for guidance.
6. The team member assigned Standard 7 must also examine the refund policy to assure that the school is in compliance with the COE refund policy or meets one of the conditions for deviation from COE's refund policy. A minimum of 25 student financial records must be selected by the team member for review; all records must be reviewed with less than 25 records. The number of records reviewed must be recorded in EDvera. (NOTE: This item is a requirement in order for the Commission to meet Federal regulations.)
7. Make sure that the team member assigned Standard 8 (Human Resources) verifies state requirements for teacher certification and randomly checks personnel files to make sure instructors meet those requirements. If applicable, verify that all instructors in associate degree programs meet COE requirements.
8. Make sure that the team member assigned Standard 10 (Student Services and Activities) verifies that student records are maintained at the main campus for all locations and that the information contained in the records is complete (see Handbook of Accreditation, Standard 10). A minimum of 25 student records must be selected by the team member for review; all records must be reviewed with less than 25 records. The number of records reviewed must be recorded in EDvera. (NOTE: This item is a requirement in order for the Commission to meet Federal regulations.)
9. Make sure that the team member assigned Standard 10 (Student Services and Activities) reviews the list of student complaints filed in accordance with the institution's student grievance policy since the most recent accreditation team visit. The team member should also review the files on these complaints to determine whether the complaints raise questions about the quality of the educational programs offered by the institution.
10. When evaluating a distance education or hybrid program, remember that the institution is **not** required to offer the same program on campus in the traditional format. The program may be offered only in a distance education format.
11. Estimate the time for the final meeting with the chief administrator.
12. At the end of the day, read and discuss the draft copy of the Team Report.
13. Determine if a private session with the chief administrator is necessary.

5. Day Four of Team Visit

a. Conclude Report Preparation
    (1) Finish any part of the Team Report that is still incomplete and have a final review of the report by the team. Be sure to include evening programs
    (2) Make sure data entry into the team report software is complete
    (3) Printing a rough draft of the team report for the team to use during the exit report and for backup purposes is suggested.
    (4) Erase any computer files regarding the Team Report on computers at the school

b. Plan Accreditation Exit Report (Oral Report)

Discuss and determine with the team members the nature, method, and time of presentation of the exit report; caution the team members not to speak in the first person during the accreditation exit report.

c. Collect and Shred Materials from Team Members that include but are not limited to:
    (1) Interview sheets (Team leader will submit to COE)
    (2) Any hard copies of the conditions and standards criterion utilized by the team
    (3) All notes and ancillary materials
    (4) Team leader shall retain a copy of the Self-Study Report and Team Report should they be needed for future reference (in the team leader's EDVera account)

d. Discuss completion and submission of *COE Expense Voucher* with the team members. Electronically submit the completed *COE Expense Voucher* to travel@council.org along with appropriate receipts, within 14 days after the last day of the team visit.

e. Accreditation Exit Report
    (1) The final meeting of the team is with the chief administrator (meeting time is determined by the team leader and the institution.)
    (2) Prior to giving the exit report, each team member may give a brief summary of their experiences during the site visit. This may be done at the team leaders' discretion.
    (3) Accreditation Exit Report: This oral report is an overview of the items of concern, suggestions and commendations. The draft of the team's report should be read verbatim. The team is not allowed to discuss the outcome of the Team Report nor provide assistance on how the institution should respond. The institution is not allowed to discuss or debate the outcome of the report.
    (4) The team leader should brief the institution about the Team Report and institutional response timelines. The team leader shall discuss the Institutional Response Report and Format *(see Appendices)* with the chief administrator and should advise the chief administrator that the official Team Report will be sent to the school by the Commission Executive Director.

f. At the conclusion of the Exit Briefing, leave the campus immediately.

6. News Media

During the visit, if the team leader is confronted by the news media, the following is a sample of what might be said:

"Considering the institutions mission, as well as accreditation conditions and ten standards of the Commission of the Council on Occupational Education, the staff of the institution has completed a self-study and written its items of concern describing the strengths and weaknesses of the institution. The visiting team evaluates and writes a report to inform the staff of the institution and the Commission as to the status of the institution as measured against its mission and the standards, conditions, and criteria of the Commission. If the visiting team finds any deficiencies, the Commission will notify the institution of the deficiencies, and the institution will be given an opportunity to make the necessary changes, as well as submit a documented response to the Commission on the action taken. The twenty-member Commission will act at a future meeting and may either grant accreditation, defer action and request additional documentation, or deny accreditation. The total process is confidential in nature until the Commission has taken final action."

After the Team Visit

1. Prepare Team Report

a. Write email to team members thanking them for their work and telling them that the final Team Report has been submitted to the Commission.

b. Edit and compile the Team Report into a unified document, rewriting the various sections as necessary.
    (1) Wording in the Team Report should be consistent throughout
    (2) Delete words such as seems, appears, and feels
    (3) Review any items of concern to ensure there is rational for the proposed violations of any policy, rule, standard, condition or criterion
    (4) Ensure that all items of concern are clearly stated and not duplicated in any other standard
    (5) While it is usually not necessary for the final draft of the Team Report to be reviewed by the team members, the team leader may ask the team members to review the document, if necessary

2. Format for Visiting Team Report

The team report software will create the final version of the Team Report.

3. Submission of Team Report to COE

Submit to COE no later than 30 calendar days following the team visit:

a. Final Team Report: This is accomplished by supplying all required data in the team report software, auditing the data, clearing all error messages reported by the audit, and submitting the Team Report electronically to the Commission through the software.
b. Worksheets for branch and extension campuses via email
c. Interview Sheets for each team member via email

NOTE: Under no circumstances should the Team Report be sent to the institution by the team leader, or its contents revealed to unauthorized individuals.

The Team Report will be reviewed by COE staff and a copy sent to the chief administrator of the

institution.

IMPORTANT REMINDER: The verification forms for graduates, placements, and licensure exams must be left at the institution to become part of the institution's accreditation file.

Conflict of Interest Policy

Purpose

The purpose of the Conflict-of-interest policy is to protect the Council on Occupational Education's interest when it is carrying out its mission of assuring quality and integrity in career and technical education. This policy is intended to supplement but not replace any applicable state laws governing conflicts of interest applicable to the Council on Occupational Education as a non-profit corporation organized under the laws of the State of Georgia.

Policy

No member of the board of commissioners of the Council on Occupational Education, ("COE" or "the Council") or any of its committee members, site visit team members, appeal panel members, or staff shall derive any personal profit or gain, directly or indirectly, by reason of his or her participation with the Council.

Each individual shall disclose to the Council any personal interest which he or she may have in any matter pending before the Council and shall refrain from participation in any decision on such matter. Any member of the board, committee, site visit team, appeal panel or staff who is an officer, board member, committee member or staff of an institution that is accredited, a candidate for accreditation or seeking accreditation from the Council shall identify his or her affiliation with the institution and shall not participate in any decision affecting that institution by the Council.

Annual Statements for Board, Committee, Appeal Panel and Staff Members

Each member of the board, committee, appeal panel or staff with board delegated powers shall annually sign a statement which affirms that such person:

a. has received a copy of the conflict-of-interest policy,
b. has read and understands the policy, and
c. has agreed to comply with the policy.

Statements for Site Visit Team Members

Each member of site visit teams shall sign a statement before participation in each site visit which affirms that such person:

a. has received a copy of the conflict-of-interest policy,
b. has read and understands the policy, and
c. has agreed to comply with the policy.

Violations of the Conflict-of-Interest Policy

If the Board has reasonable cause to believe that a board, committee, site visit team, appeal panel or staff member has failed to disclose actual or possible conflicts of interest, it shall inform the individual of the basis for such belief and afford the individual an opportunity to explain the alleged failure to disclose.

If after hearing the response of the individual and undertaking such further investigation as may be warranted under the circumstances, the board determines that the individual has in fact failed to disclose an actual or possible conflict of interest, it shall take appropriate action consistent with the by-laws of the Council on Occupational Education.

Conflict of Interest Statement

Name of Institution
Hosting Site Visit: _____

At this time, I am a board member, committee member or an employee of the following organizations:

_____

_____

I_____hereby affirm that I have received a copy of the Council on Occupational Education's Conflict-of-Interest Policy and that I have read, understood and agree to comply with the policy. I also affirm that except as described below, I am not now nor at any time during the past year have I been:

1. A participant, directly or indirectly, in any arrangement, agreement, investment, or other activity with the institution to be visited that is accredited by the Council or is an applicant or candidate for accreditation by the Council which has resulted or could result in personal benefit to me.

2. A recipient, directly or indirectly, of any salary payments or loans or gifts of any kind or any free service or discounts or other fees from or on behalf of the institution to be visited that is accredited by the Council or is an applicant or candidate for accreditation by the Council.

Any exceptions to 1 or 2 above are stated below with a full description of the interest, whether direct or indirect, which I have or have had during the past year involving institutions that I have visited that are accredited, applicants for accreditation or candidates for accreditation by the Council.

_____

_____

Date: _____ Name: _____

Signature: _____

PLEASE COMPLETE:
In the event there is an emergency, please contact:

Name of Person:_____Relationship:_____

Phone Number: _____2_____

Sample Team Correspondences:

Sample Email Welcoming and Confirming the Team Members

Good evening Everyone:

Thank you for agreeing to serve on the ABC College reaffirmation team visit scheduled for _____, 2026. I am looking forward to meeting each of you and to serving with you on this team. I am sure we will have a great week and visit.

The COE Fellow will be conducting the preliminary visit and the pre accreditation exit meeting. After the preliminary visit, I will schedule an Accreditation Kick-off Meeting with the team to provide information about travel, accommodation, and the agenda for the visit. **Please wait until Accreditation Kick-Off Meeting is held before making any travel arrangements.**

Again, thank you for agreeing to serve, and I will be in touch next week. Have a wonderful evening.

Your Team Leader

Sample Email #2 from team leader to team members:

Dear Team Members,

Thank you for agreeing to serve as a team member for the Council on Occupational Education reaffirmation visit to XYZ COLLEGE, 123 N. RED STREET, ANYWHERE, USA. I look forward to working with you on this assignment. I am confident we can provide a very thorough and objective review of the institution's compliance with the Commission's standards, conditions, policies, and rules.

The COE Fellow will conduct the preliminary visit and then the team will have an Accreditation Kick-Off Call. On this call, I will provide information regarding travel, accommodation, and the team visit**. Please do not make any travel arrangements until after the Kick-off Call.**

Please check your EDVera account and review the Team Roster with the standards and programs you have been assigned to review in the team report software. A full agenda and further details will be provided during the Accreditation Kick-off call. You will receive the self-study report with exhibits in the EDVera team report software. Please let me know if you have any issues accessing the self-study report. I am looking forward to seeing you all!

Your Team Leader

Sample Email #3 from Team Leader to Team Members

Dear Team Members:

Thank you for agreeing to serve as a team member for the Council on Occupational Education accreditation visit toscheduled for_____. I look forward to meeting and working with you on this assignment. An Accreditation Kick-Off Meeting will be scheduled.

The institution's staff have put a lot of effort into preparation for the accreditation visit and are excited to show what they have accomplished.

Since you are receiving this email, the team roster is complete, and you should now have access to the institution's team visit report file in your COE EDvera account (https://my.council.org/) under the 'Applications' tab. Please review your assignments as indicated on the completed roster. You can find the roster in the team report software by clicking on the Visiting Team Information section and then on the Team Roster menu option.

Please remember to email your travel itinerary to the COE coordinator, the institution's contact and to me (Team Leader). If you have any questions or problems, do not hesitate to contact me via email or cell.

You should prepare for the visit by reviewing the following:

- Handbook of Accreditation
- Guidelines for Accreditation Visiting Team Members
- The Self-Study Manual
- Institution's Website
- Accreditation Visiting Team Leader and Member Certification Part 2: Writing Items of concern, Suggestions, and Commendations PowerPoint Presentation

All COE-related documents are available at https://council.org/manuals/. The institution's Self-Study Report will be uploaded in EDvera 60 days prior to the team visit. If you are unable to login into EDvera and access the institution's self-study, please contact COE staff immediately.

If your contact information on the Team Roster is incorrect, please notify susie.hill@council.org to provide the correct information.

Keep your original receipts for expenditures from the time you leave home and return. Travel Vouchers for reimbursement of your actual expenses will be reviewed during the visit, but receipts are required.

Thank you in advance for your participation. I am sure you will enjoy the visiting team experience with your peers.

Team Leader_____Email/Cell_____/_____

Sample Email #1 with School Information:

Dear Team Members:

Hello, I am excited to serve on this team with you! EXAMPLE SCHOOL has put in a lot of work to prepare for our visit. The institution has a main campus and two instructional service centers as part of this institution. We will have the opportunity to review how their school complies with the 10 standards of the Council on Occupational Education and review their 10 approved programs. I am confident we can do an effective and objective review of the institution's compliance with the standards, conditions, policies, and rules of the Commission.

The COE Fellow has conducted the preliminary visit, and I participated in the Pre-accreditation Visit Exit Meeting. The school personnel are eager to host our team. The staff was very responsive to my requests. I have included several documents within this email to assist with the upcoming visit.

Team leader contact information

_____ Cell: 330-466-0482. Office 330-669-7070 ext 1322

Contact at EXAMPLE SCHOOL

CAO NAME 333-333-3333 cell

Team Roster: Included in the team report Software

(Attached to email)

Lodging:

https://www.hilton.com/en/hotels/wooohhx-hampton-wooster/ --the school has booked our rooms for Sunday through Thursday.

Hotel Name and Address

School locations

EXAMPLE SCHOOL has a main campus located at Anystreet USA

Instructional Service Center located at: 2575 North USA—this center only has secondary students and will not be part of our review.

Branch Campus located at: 2595 South USA (this campus is 50 miles from the main campus)

Transportation:

Flights: Please plan to arrive at the hotel no later than 2:00 on Monday, Month and day. Plan for departure Thursday evening, Month and day.

The campus will pick us up at baggage claim.

EXAMPLE SCHOOL approved program list: Provided in EDvera

TEMPLATE

{Name of Institution}

Accreditation Visit Kickoff Meeting Tentative Agenda

(Day, Month, Time) Monday, April 23, 2025 at 2:00pm EST (Location: Virtual)

I. Introductions

II. Preliminary Visit Highlights from the Fellow

III. Team Logistics

a. Travel

b. Accommodations

c. Transportation

IV. Visit Logistics

a. Work Room

b. EDvera

c. Visit Assignments

d. Visit Agenda Review

e. Student & Staff Interviews

V. Questions

TEMPLATE

{Name of Institution}
Accreditation Visit Tentative Agenda

Day, Date
3:30 PM* Team members arrive at TBD hotel (City, State)
4:00 PM Visiting Team meeting
5:00 PM Team departs for institution
6:30 PM Team attends "Meet & Greet"
8:00 PM Team returns to hotel

Day, Date
8:00 AM* Team departs for hotel
9:00 AM Accreditation Visit Entrance Meeting
9:30 AM Facility Tour & Begin Program Reviews
12:00 PM Team working lunch provided by institution
1:00 PM Team continues program reviews (scheduled interview times for program students and staff from 1:30 PM - 3:00 PM)
5:00 PM* Depart institution for hotel
6:30 PM* Team has dinner with institution administration (Location: TBD)

Day, Date
8:00 AM* Team departs hotel for institution
8:30 AM Arrive at institution for Standards reviews and interviews
12:00 PM Team working lunch provided by institution
1:00 PM Team continues Standards reviews (scheduled interview times for Standards-related staff from
1:30 PM – 3:00 PM)
5:00 PM* Depart institution
6:30 PM Team dinner (location: TBD)

Day, Date
8:00 AM* Team departs hotel for institution
9:00 AM Arrive at institution for preparation of draft team report
10:30 AM Team Leader meets with Chief Administrator to discuss draft findings
11:00 AM* Accreditation Visit Exit Meeting - Team delivers oral exit report and departs the institution

**Institution provides transportation*

All times are local
At any time prior to or during your visit, Team Leader Name can be reached by calling or texting XXX-XXX-XXXX

Last updated 4/4/2025

TEMPLATE

{Name of Institution}

Visit Team Meeting Tentative Agenda

(Day, Month, Time) Monday, June 2, 2025, 4:00 PM (Location: TBD)

I. Review of Peer Review Process

a. EDvera Review

b. Team Assignments Review

c. Handbook of Accreditation & Supporting Documents

II. Review of Agenda for Accreditation Visit

a. Day One: Meet & Greet

b. Day Two: Facility Tour & Programs Review

c. Day Three: Standards Review

d. Day Four: Finalize Work & Exit Meetings

III. Review Concerns/Observations from Preliminary Visit

IV. Review Potential Interview Questions & Schedule

V. Team Logistics

a. Hotel Rooms

b. Contact Information

VI. Questions

Last updated: 4/4/2025

TEMPLATE
{Name of the Institution}
Accreditation Visit Entrance Meeting Tentative Agenda
(Day, Month and Time) Monday, June 2, 2025 5:30 PM (Location: TBD)

I. Introductions

II. Review of Peer Review Process

a. EDvera Review

b. Team Assignments Review

c. Handbook of Accreditation & Supporting Documents

III. Review of Agenda for Accreditation Visit

a. Day One: Meet & Greet

b. Day Two: Facility Tour & Programs Review

c. Day Three: Standards Review

d. Day Four: Finalize Work & Exit Meetings

IV. Questions

Last updated: Date

TEMPLATE
{Name of Institution}

Accreditation Visit Exit Meeting Tentative Agenda
(Day, Date, Time) Monday, June 5, 2025 10:30 AM (Location: TBD)

I. Chief Administrator Meeting

a. Team Leader Name meets with the CAO to discuss preliminary findings of the team

b. Team Leader Name finalizes team departure information with the CAO

II. Oral Report (approximately 11:00 AM)

a. Overview of Oral Exit Report Process

b. Comments from Team Members

c. Explanation of Team Report Process

i. Team has 30 days to submit final report

ii. Once received, the institution will have 30 days to respond.

iii. Staff will include specific instructions on the format and requirements of the Institution Response Report

iv. Process of reaffirmation through the final decision of the Commission

d. Questions or comments from the institution (none after report begins)

e. Final Team Leader Comments (draft report)

f. Team Delivers the Oral Report

III. **Team Departs the Institution**

Last updated: Date

COUNCIL ON OCCUPATIONAL EDUCATION

Team Leader
Accreditation Visits Report

Logistics Information

Institution Name:

Main Campus Address:

Additional Campus Addresses:

Institution's Chief Administrator Name, Email and Number:

Institution's COE Liaison Name, Email and Number:

Institution's On Ground Contact Name, Email and Number (if different than the COE Liaison):

Institution's Additional Details (e.g., Number of Campuses, Distance Between Campuses, Number of Students, Number of Programs, etc.):

Date of Accreditation Visit:

Travel Information

Hotel Name:

Hotel Address:

Hotel Phone:

Transporter(s) Name(s):

Transporter(s) Phone Number(s):

Transportation Mode:

☐ **Return the Conflict-of-Interest Form**

During the Preliminary Visit Exit Meeting the Team Leader (virtually) will discuss and coordinate the following logistics with the institution's Chief Administrator (CAO) or designee:

- **Names/Number of People on the Team**
  - Discuss the number of team members
  - Discuss the team members program assignments
  - Discuss the team members' standards assignments

- **Travel**
  - Discuss means of travel.
  - Discuss the itinerary since some team members may need to come in on Sunday night or leave on Friday due to travel and schedule.

- **Accommodation**
  - Discuss the hotel for the visit
  - Discuss billing- direct bill or individual's pay
  - Discuss food eaten at the hotel- charged to room?
  - Confirm who the campus contact is for the team member travels
  - Meeting room at the hotel for the first team visit

- **Transportation**
  - To and from airport transportation accommodations
  - To and from the hotel to the institution transportation accommodations
  - Off-campus site visits
  - Any clinical sites to be visited.

- **Work Room Expectations & Requirements**
  - Quiet and private area (Make sure the room is large enough for the team to work comfortably with tables and chairs.
  - The workroom is off-limits to faculty and staff during the visit.
  - Room should be cleaned after the team leaves each day
  - Availability of onsite technical assistance
  - Office supplies such as post-it notes, shredder, trash cans, paper, pens, staplers, paper clips, etc.
  - Individual computer (two monitors, if possible) and internet access for each team member, and software requirements for team report software (Firefox internet access required)
  - 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 space.
  - Directory or listing of institutional faculty, staff, and administration to assist team in identifying school contacts.
  - Last Self Study and Campus Response to the last Team Visit

Listed below are action items that must occur before the accreditation kickoff meeting.

1. The Team leader will review the final draft of the institution Self-Study that uploaded in EDvera at least 60 days prior to the Schedule Team Visit.

2. The Team Leader should note if the institution has added, deleted, or is teaching any programs since the last accreditation visit.

3. The Team Leader should review the institution Institution's Catalog, Student Handbook, Staff Handbook, Brochures, Websites URLs, and any publications used for recruitment. Electronic access is acceptable.

4. The Team Leader should develop the following agendas for the Accreditation Visit

- **Accreditation Visit Kickoff Meeting**
- **Visit Team Meeting**
- **Accreditation Visit Entrance Meting**
- **Accreditation Visit Exit Meeting**
- **Accreditation Visit Tentative Agenda**

Sample templates will be provided as a resource.

During the virtual Accreditation Kickoff Meeting, the Team leader will discuss the following with the Team Members and Fellow:

- Team Leader will Chair the Meeting and Review
- Preliminary Visit Highlights from the Fellow
- Travel
- Accommodation
- Transportation
- Work Room
- EDvera
- Visit Assignments
- Interviews Requested
- Review Accreditation Visit "FINAL" Agenda

Also, the Team Leader should review and discuss the process of reviewing student records, refunds, and grievances during the visit. Note: It helps to get the names of the campus contacts for Standards 3, 7, and 10.

The Team Leader should verify the facility operates in a safe environment (e.g., exit signage, posted evacuation routes, etc.), equipment (e.g., Reasonable accessibility to up to date first aid kits, fire extinguishers, eye-wash stations (if stations are mandated), and emergency plans.

Please provide a narrative of the Preliminary Visit Exit Meeting and the Accreditation Kickoff Meeting with the details mentioned above.

This report must be submitted in Edvera Documents no later than 10 days after the Accreditation Kickoff Meeting.

Self-Study Exhibit Preparation

Exhibits are electronic documentation which supports each condition and criterion and must be made available for the team in EDvera to review during the on-site visit. Exhibits are not transmitted to the team or to the Council office. The self-study document should be uploaded in EDvera sixty (60) days prior to the scheduled visit.

Exhibits should clearly demonstrate the institution's compliance with each of the conditions and criteria. All materials should be easily accessible to the team to ensure the documentation can be reviewed in its entirety. In some instances, the same exhibits can apply to more than one standard, therefore, documentation can be duplicated, as needed. Exhibits should be set up according to the latest version of the COE conditions and standards, which are available in the Handbook of Accreditation on the COE website.

The following documentation must be kept from one accreditation team visit until the next. All documents will be prepared as exhibits in the self-study report.

1. Permanent Accreditation File Documents
2. Institutional Advisory Agendas and Minutes
3. Occupational Advisory Agendas and Exhibits
4. Strategic Plan and All Other Plans
5. Records of Student Refunds
6. Grievances
7. Default Management Plans
8. Financial Reports
9. Copies of Promotional and Advertising Material (must be kept on file for 3 years)

IMPORTANT: The Conditions check sheet and the conditions and standards check sheets for Standards 3, 7, and 10 contain items that should only be completed by the visiting team. The institution is not required to create exhibits for these items. Documentations for these items should be a document with the name and contact information for the individual at the institution who will provide the information to the team.

Exhibit Format

Exhibits must be made available to the team in electronic format as part of the self-study report in EDVera.

It is imperative that the institution's exhibits are easily accessible by all team members in the self-study report. Clearly labeled digital exhibits are uploaded into the Self-study report by criterion. Each criterion for conditions and each criterion in the standards will require an exhibit (documentation) to support the narrative for the criterion.

Confidential Materials

The location and name of the person in charge of confidential exhibit materials, such as personnel evaluations, audited financial statements, budgets, etc., should be placed in an electronic folder appropriately identified by standard number and uploaded as an exhibit in the self-study report.

Suggested Interviewing Techniques

Interviews with students should be conducted in a space that does not include administrators, faculty or other institutional staff. Teacher or faculty interviews should not occur in the presence of administrators. The team should interview all institutional faculty, staff and affiliates.

PREPARATION FOR INTERVIEWS

1. Become knowledgeable about the standards assigned;
2. Review the school's self-study report and develop questions that need further clarification on how the school is meeting the various aspects of the standards;
3. Develop a list of the people who should be interviewed for information to verify the items included in the self-study report.

TECHNIQUES FOR CONDUCTING INTERVIEWS

1. Start the interview by discussing a general topic and attempt to place the interviewee at ease;
2. Introduce yourself and explain the reason for conducting the interview;
3. Ask questions clearly and concisely; and
4. Allow the interviewee time to think and answer:
    a. Listen attentively;
    b. Do not interrupt the interviewee;
    c. Make notes but do not record;
    d. Keep the interview on track by re-stating the question, if necessary;
    e. Avoid asking "yes" or "no" questions, in many cases; begin questions with words such as "who," "where," "what," "why," "when", in an effort to solicit a narrative response
    f. Ask follow-up questions on comments made by the interviewee, if necessary
5. Express your appreciation

POST-INTERVIEWS

1. Immediately detail information or conclusions drawn from interview;
2. Follow-up on information concerning the institution based on the discussion with the interviewee, if necessary.

Interview Questions

FOR INSTRUCTORS

COE Staff / Faculty Interview Educational Experience Evaluation

Please provide feedback on your overall satisfaction.

General Information

Interviewer's Name

Institution:

Date:

Time:

Employee:

Title:

Standard 2: Educational Programs

How do you ensure that course content, lesson plans, and instructional materials are consistent with program outcomes?

How often is the curriculum reviewed and updated, and what role do you play in that process?

How is your program structured to ensure alignment with its stated objectives and industry expectations?

What improvements would you recommend for your program?

How does the institution incorporate feedback from industry advisory boards or employers?

Standard 3: Program Outcomes

What role do you play in tracking and improving program outcomes?

How are program outcomes communicated to faculty and used for continuous improvement?

Standard 4: Strategic Planning

How do faculty and administration participate in the annual review of the strategic plan and its progress, and what role do you play in that process?

Standard 5: Educational Resources

How would you describe the adequacy and currency of the equipment and resources available to you?

How would you describe the availability and adequacy of campus resources in supporting your job responsibilities?

Standard 6: Institutional Infrastructure

What do you know about the institution's health and safety plan, and how is it communicated?

How would you describe the overall safety of the campus?

Standard 8: Human Resources

How were you oriented or onboarded into your role at the institution?

What are your primary responsibilities, and how are they communicated and evaluated?

How does the institution support your ongoing professional development?

How does leadership communicate priorities or changes that may impact resources or operations?

Standard 10: Student Services

How do you contribute to admissions, advising, or orientation processes?

How do you ensure the information you provide aligns with official publications (catalog, syllabus, website)?

How are updates to policies, procedures, or program information communicated to faculty and staff?

What support services are available to students, and how are they referred to them?

How do you assist students who are struggling academically or personally?

How are student records maintained and protected?

How do you ensure communication with students is clear, accurate, and timely?

Summary of Interview

COE Student Interview Educational Experience Evaluation

Please provide feedback on your overall satisfaction.

Date:

General Information

Institution:

Time:

Student's Program

Day or Evening:

Standard 2: Educational Programs

How did your orientation experience prepare you for your program and expectations as a student?

Can you describe how your lesson plans, assignments, and course expectations are explained to you?

How would you describe the balance between classroom instruction and hands on training in your program?

What challenges have you experienced during your program, and how have they been addressed?

Standard 3: Program Outcomes

How do you feel this program is preparing you for employment in your field?

What type of academic support services (such as tutoring or remediation) are available to you, and how have you used them?

Standard 5: Educational Resources

How accessible are instructors and staff when you need assistance?

How easy or difficult is it to access your grades, assignments, & academic information?

Standard 6: Institutional Infrastructure

What type of technology do you use in your learning?

How would you describe the safety of the classroom, lab, and clinical environment?

What do you know about the institution's health and safety plan, and how is it communicated to students??

Standard 10: Student Services

What is your understanding of the institution's grievance procedures, and how would you use them if needed?

How would describe your experience with the admission and enrollment process from start to finish?

In what ways did the institution communicate important information such as program costs, schedule, and expectations?

What information have you received about job placement, career opportunities, or employer expectations?

Student Experience Reflection

What do you like most about your program?

What recommendations would you give to improve student experience?

Would you recommend this institution to others? Why or why not?

Summary of Interview

Institutional Response Report and Format

(COMPLETE and FINAL response due 30 days after receipt of the team report, or by the due date stated on the official COE correspondence.)

General Information

IMPORTANT: An institution has up to twelve (12) months from the time it is first reviewed by the Commission to resolve all Items of concern.

Items of concern
An institution MUST respond to all **Items of concern** in the visiting team report.

Suggestions
An institution is NOT required to respond to a **Suggestion** offered by the visiting team, but it is recommended that the institution do so. Schools electing to respond to a Suggestion should follow the same format as for a Items of concern (See page 2).

The response to a Suggestion should be included in the last part of the Institutional Response Report (Separated from and placed AFTER all responses to Items of concern).

No Items of concern or Suggestions
An institution that does not receive Items of concern or Suggestions should write a letter (on the institution's letterhead) to the Executive Director of the Commission, Dr. Kirk Nooks. Acknowledge that the school received no Items of concern or Suggestions. The letter should state that the institution is requesting initial accreditation or reaffirmation of accreditation.

Email the correspondence to evaluations@council.org

IMPORTANT: The institution must provide a COMPLETE response, along with supporting documentation/pictures, when appropriate, reflecting that a Items of concern or Suggestion is now **RESOLVED**. **Therefore, it is critical that the institution corrects the condition BEFORE responding**. Providing promises that state what the institution WILL DO does not constitute resolution of a Items of concern, nor does it adequately address a Suggestion.

HOW TO SUBMIT DOCUMENTATION

FORMAT

Submit response(s) as an 8 ½ x 11 letter-sized documents in **Adobe PDF format**. Provide electronic documents/pictures. No hard copies are required.

The Institutional Response Report is comprised of three parts:

1. Document cover page – written by the Chief Administrative Officer of record with the Council, and addressed to Executive Director, Dr. Kirk Nooks.
2. Institution's Response to Items of concern
3. Institution's Response to Suggestions (if applicable)

Each Items of concern or Suggestion should be comprised of three parts:

1. Re-state Items of concern or Suggestion: At the top of the page, restate the Items of concern/Suggestion verbatim from the Team Report. Also, if addressing more than one Items of concern or Suggestion, assign numbers to each items of concern, beginning with "Items of concern #1", (followed by the re-stated items of concern) or "Suggestion #1". The next will be listed as "Items of concern #2" or "Suggestion #2", and so forth.
2. Response: Write a clear and concise narrative response to the Items of concern. Be sure that the response addresses how and when the violation depicted by the Items of concern was resolved.
3. Documentation: Provide documentation to reflect how the Items of concern or Suggestion was addressed. Types of documentation may include, but are not limited to, letters, memoranda, financials, purchase orders, work orders, and even photographs, if appropriate.

ITEMS OF CONCERN OR SUGGESTIONS AND THEIR CORRESPONDING DOCUMENTATION SHOULD BE **PLACED TOGETHER.** Place documentation for each particular Items of concern or Suggestion directly **BEHIND** the narrative portion of the Items of concern or Suggestion.

IMPORTANT: DO NOT PLACE ALL SUPPORTING DOCUMENTATION TOGETHER AT THE END OF THE INSTITUTIONAL RESPONSE REPORT.

REPEAT STEPS 1-3 FOR EACH ITEMS OF CONCERN OR SUGGESTION.

RESPONDING TO AN ITEMS OF CONCERN: SAMPLE FORMAT

Item of concern #1 – Restate Item of concern or Suggestion as defined in the Team Report.

Response #2 – Institution's narrative to #1 Items of concern or Suggestion.

(**Note**: Provide documentation/picture(s) to reflect that #1 Items of concern or #1 Suggestion has been resolved). **Important**: Please be succinct in your response. To ensure your Institutional Response is reviewed in a timely manner, please limit responses and documentation/ picture(s) to no more than **10 pages** per items of concern. (Example: An institution with 40 FNC will provide a report to the Council of approximately 400 pages or less.)

HELPFUL HINTS

CONTENT

1. Ensure that response is typed and in English.
2. Start preparing for the institutional response as soon as possible.
3. Employ relevant staff members to assist in the creation of this document.

4. **Submit the COMPLETE response as ONE document in EDvera**.
5. Be specific in directly addressing the criterion in the narrative and corresponding documentation/picture(s). In other words, what action has the school NOW TAKEN to resolve the Items of concern or Suggestion given by the team?
6. Address EACH part of all multi-part Items of concern. If one component has not been addressed, or if a required process has not been implemented, the criterion will remain unresolved.
7. Ensure that ALL pages are easy to review. Do not submit illegible or poorly copied information or pictures, upside-down pages, or documents that are askew.
8. Test all digital files to ensure that they are not corrupted, can be opened, and that each page can be viewed.
9. Failure to submit a **COMPLETE** institutional response to the report within 30 days after receiving it or by the deadline stated on the official COE letter may adversely affect the institution's accreditation status.

FORMAT:

1. Carefully organize the institutional response document, ensuring that it is grammatically correct and will not be difficult to follow.
2. Number all pages of the institutional response.
3. Provide a table of contents listing each individual Items of concern and Suggestion. This helps to ensure that the information is easily accessible to those who will be reviewing it.

Contact Council staff (evaluations@council.org) should you have questions relative to content or formatting.

AFTER THE SCHOOL SUBMITS A RESPONSE

Below is some additional information on the processes that occurs once the institution submits its response to the Team Report:

All documentation pertinent to the institution's Self-Study and Team Report are placed on the next available agenda for review by the COE Commission (Governing Board). Should you have questions about that timeframe, feel free to contact COE staff.

Commission readers review documentation, which includes:

- Institution's Self-Study
- Visiting Team Report
- Institutional Response Report
- Other documentation, such as catalogs, websites, etc.

The Commission's action is recorded, and the institution will be notified in writing of the Commission's decision.

Commission readers are never from the same state as the institution (or any of its campuses) and are required to sign a conflict-of-interest statement to ensure that their reviews and resulting actions are as objective as possible.

NOTE: The Chief Administrative Officer or other representatives from the institution will not be present at the Commission's review of the institution.

The Accreditation Process

1. Institutions interested in membership of the Council must provide a letter of intent to seek candidacy.
2. The on-site administrator or other full-time employee at the main campus must attend a Candidate Academy within 12 months prior to submitting an application for candidate status.
3. Submission of an application for candidacy.
4. Candidacy team visit.
5. Commission review of application and candidacy visit report. Approval of candidate status by the Commission. If disapproved, an appeal may be made to the Commission.
6. After acceptance as a candidate, an annual report is submitted each year for Commission review. The annual report, while in candidate status, is an update on the institution's status towards initial accreditation.
7. Non-public institutions must submit an audited financial statement each year after acceptance as a candidate and throughout their term of membership with the Council. Audits must be submitted within 6 months of the end of the fiscal year and must be accompanied by a completed COE Financial Questionnaire.
8. During candidate status, no substantive changes may be approved except for changes in existing programs (Public Schools only)
9. The earliest date that an institution can host an accreditation visiting team will be six months after a representative attends the mandatory COE Self-Study 1, Self-Study 2, 20** Cohort Orientation, Responding to the Team Report, and Annual Report workshops. The maximum time an institution can be in candidacy status is three years. Candidate institutions must host an initial accreditation team visit within 24 months after being accepted by the Commission.

ACCREDITATION

1. FOR INITIAL AND REAFFIRMATION OF ACCREDITATION: The on-site administrator or other full-time employee at the main campus must attend the COE Self-Study 1, Self-Study 2, 20** Cohort Orientation, Responding to the Team Report, and Annual Report workshops required by the Commission within 6 to 18 months before hosting a visiting team.
2. A Self-Study should be initiated by the end of the first year as a candidate, or, for institutions seeking reaffirmation, at a time appropriate to the target date for hosting an accreditation team visit.
3. For institutions seeking initial accreditation, an accreditation team visit must be hosted no sooner than 6 months after attending the mandatory COE Self-Study 1, Self-Study 2, 20** Cohort Orientation, Responding to the Team Report, and Annual Report workshops, and no later than 24 months after acceptance as a candidate.
4. Institutions seeking reaffirmation must complete a survey of five unavailable dates the institution cannot host an accreditation team visit. (Council staff initiates an inquiry to institutions to schedule their visit. Institutions work with Council staff to select the most appropriate dates for accreditation team visits.)
5. The visiting team appointed by the COE staff.
6. A preliminary visit conference meeting is scheduled six months prior to the scheduled team visit.
7. A preliminary visit entrance meeting is scheduled at least three months prior to the scheduled team visit.
8. A preliminary visit exit meeting is scheduled at the conclusion of the preliminary visit entrance meeting.
9. A Preliminary Summary Report from the COE Fellow is submitted to the Team Leader and COE Evaluation Department within 15 days.
10. An accreditation visit entrance meeting is scheduled on the morning after the Arrival Day.
11. The team visit includes a review of all programs and activities of the school.
12. An accreditation visit exit meeting is scheduled on the final day prior to departure. An oral report is made to the school during this exit meeting. This exit report will identify the teams' items of concern (if applicable).
13. An electronic team report is sent to COE staff by the team leader within 30 days of the team visit.
14. After review, the COE staff sends an electronic Team Report to the institution.
15. If items of concern or suggestions are noted in the report, the institution must address each item of concern and is highly encouraged to address each suggestion as well. The institutional response must identify how the school resolved each item of concern, along with the documentation supporting the resolution.
16. The chief administrator writes a letter requesting accreditation and submits one electronic copy of the institutional response, if required, to the team report within 30 days of the date of the COE Staff's transmission of the team report to the institution.

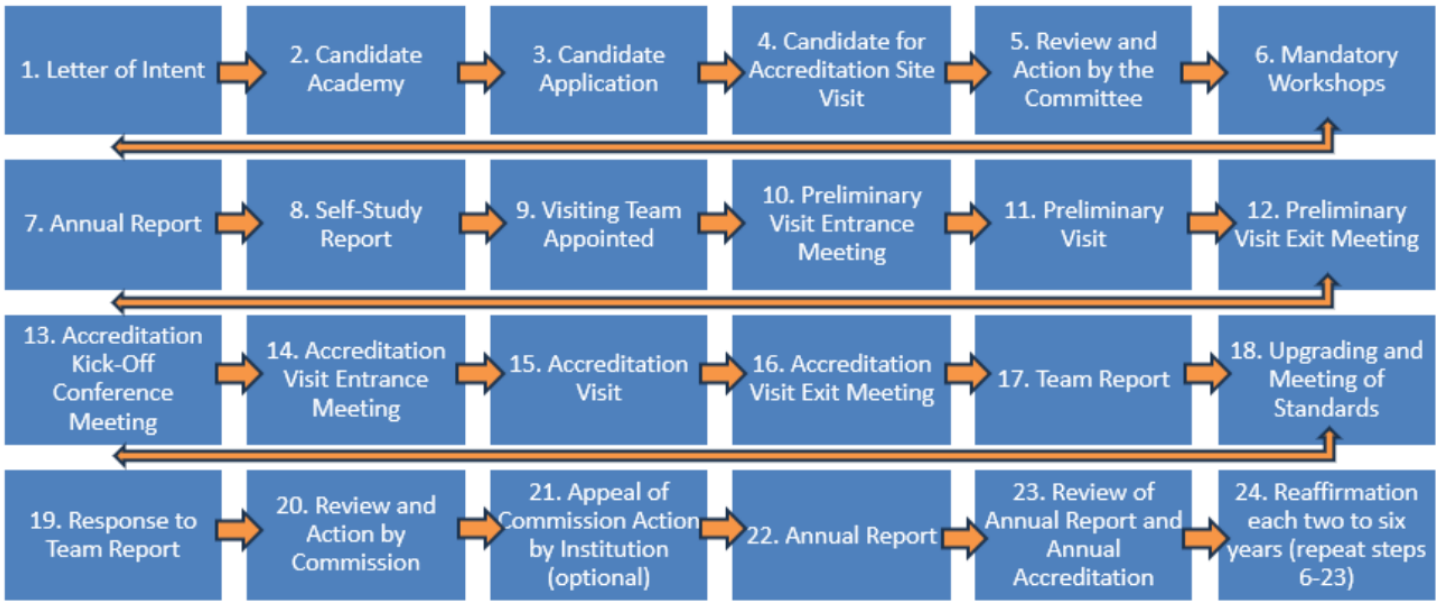
17. During the Commission meeting, commissioners will review an institution's Self-Study report, Team Report, Institutional Response Report, and other supporting documents for initial or reaffirmation of accreditation to determine accreditation status.
18. The Commission may defer action and request additional documentation, grant accreditation, or deny accreditation. If accreditation is granted (based on the Self-Study, Team Report, and Institutional Response report) the Commission will specify the number of years in the next reaffirmation cycle (two [2] to six [6] years). The year of reaffirmation may be changed for just cause.
19. An institution may appeal a negative action.

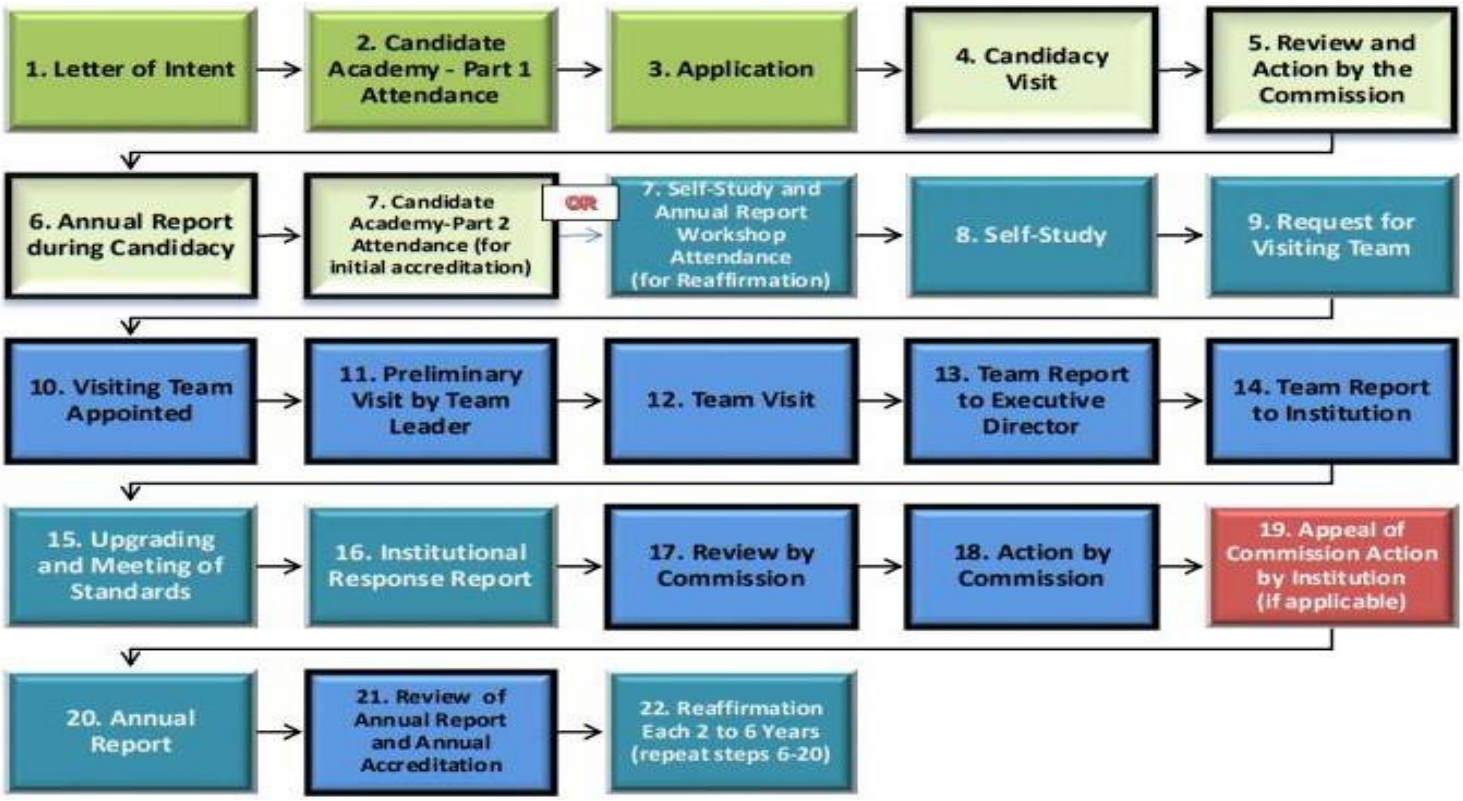
Annual Review

1. All candidate and accredited institutions must submit an annual report to the Commission.
2. Continued candidate status or accreditation is determined annually by Commission approval of annual reports.
3. During the year prior to the year that ends the reaffirmation period, a school must attend a self-study workshop, begin another self-study, and request another team visit. Teams for reaffirmation of accreditation are scheduled every 2 to 6 years. The Commission determines the reaffirmation schedule.

NOTE: Failure to submit an annual report or additional information regarding the annual report, if requested, by the due date established by the Commission shall be grounds for an institution to lose its candidacy status or accreditation.

ACCREDITATION PROCESS FLOW CHART




1. Letter of Intent
2. Candidate Academy - Part 1 Attendance
3. Application
4. Candidacy Visit
5. Review and Action by the Commission
6. Annual Report during Candidacy
7. Candidate Academy-Part 2 Attendance (for initial accreditation)
OR
7. Self-Study and Annual Report Workshop Attendance (for Reaffirmation)
8. Self-Study
9. Request for Visiting Team
10. Visiting Team Appointed
11. Preliminary Visit by Team Leader
12. Team Visit
13. Team Report to Executive Director
14. Team Report to Institution
15. Upgrading and Meeting of Standards
16. Institutional Response Report
17. Review by Commission
18. Action by Commission
19. Appeal of Commission Action by Institution (if applicable)
20. Annual Report
21. Review of Annual Report and Annual Accreditation
22. Reaffirmation Each 2 to 6 Years (repeat steps 6-20)

FOR MORE INFORMATION

Requests for additional information on the standards, conditions, and criteria of the Commission of the Council on Occupational Education should be addressed to:

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Executive Director
Council on Occupational Education
7840 Roswell Road, Building 300, Suite 325
Atlanta, Georgia 30350
Telephone: 770-396-3898, Ext. 105 or
800-917-2081, Ext. 105
Website: www.council.org