Chapter Ten
Accreditation Site Visit Team Member Information

Introduction
This chapter focuses on the responsibilities and duties of the individuals who conduct accreditation site visits and the principles guiding those visits. California's accreditation system for educator preparation programs depends on a large cadre of dedicated education professionals who are committed to ensuring that preparation programs in the state are high quality. The Board of Institutional Review (BIR) is comprised of individuals with expertise across all credential areas who confirm institutions are implementing programs aligned with Commission adopted standards. Individuals selected for the Board of Institutional Reviewers (BIR) receive specialized training prior to service on one of the Commission's accreditation activities, including serving on an accreditation site visit team. BIR members attend additional periodic trainings and meetings to ensure calibration across all reviews. All BIR members are volunteers and are not compensated for their contributions except to receive reimbursement for travel and meal expenses.

The information presented in this chapter is designed to provide an understanding of the responsibilities and duties of accreditation team members. This chapter provides descriptions of essential team activities that occur during the accreditation site visit which culminates in an accreditation recommendation (discussed in Chapter Eight). Chapter Eleven contains a description of the skills and techniques used by BIR team members.

I. Purposes and Responsibilities of Accreditation Site Visit Teams
Accreditation teams review the institutions that offer educator preparation programs and the programs either through, in person or, when permitted, virtual visits, to interview a variety of individuals with knowledge of that institution's educator preparation programs, confirm findings from the Common Standards review, Program Review, and Preconditions responses, as well as examine additional program documents, data, and evidence. The purpose of the team's work is to provide the Committee on Accreditation (COA) with sufficient information so that the COA can determine whether the institution's educator preparation programs meet Commission-adopted standards. Accreditation teams focus on issues of quality and effectiveness across the institution's education unit as well as within each of the credential programs offered. The accreditation team determines whether the institution and its programs are effectively implementing standards and makes an accreditation recommendation to the COA on the basis of evidence collected from multiple sources (e.g., Program Review and Common Standards Submissions, data available on the Accreditation Data Dashboard, and other outcomes measures), supporting documentation, and related evidence. Implementation of the institution's programs is verified through interviews across representative groups during the site visit. Site visit reviews include off-campus programs as well as those on the main campus. To accomplish its purpose, accreditation teams complete the following tasks:

1. Develop a preliminary perspective on the extent to which an institution and its educator preparation programs meet the Common and Program Standards by reviewing the institution's: a) Common Standards Submission and Addendum, b) Program Review Submission and Addendum, and c) other related evidence as submitted, including information in the Accreditation Data Dashboard (ADD).

2. Collect additional information to confirm or dispute the preliminary perspective by: a) interviewing credential candidates, program completers, employers of program completers, field experience supervisors, program faculty, administrators, advisory boards, and other key individuals during the site visit, and b) reviewing materials, such as course syllabi, formative assessment documentation, candidate records, and reports of follow-up studies or surveys, as well as any other pertinent sources of information made available to the accreditation team.

3. Come to consensus as to whether the institution's education unit meets each of the Common Standards and whether each educator preparation program meets each of the appropriate Program Standards. If it becomes apparent that the institution may not be in compliance with a precondition, the team may also review further evidence to make such a determination.

4. Come to consensus on an accreditation recommendation to be submitted to the Committee on Accreditation. The recommendation must be one of the following: *Accreditation*, *Accreditation with Stipulations*, *Accreditation with Major Stipulations*, *Accreditation with Probationary Stipulations, or Denial of Accreditation* for the institution and all its credential programs.

II. Responsibilities of Accreditation Team Members

Team Member Representation
During the accreditation visit, accreditation team members represent the Commission and the Committee on Accreditation rather than their own institutions. As such, team members identify themselves as a member of the Accreditation Team when introducing themselves to an institution's constituencies.

Team Member Responsibilities
Effective accreditation site visits occur when team members focus exclusively on tasks required for the visit and are fully committed to providing an impartial and comprehensive review of an institution and its programs. In keeping with this, team members should not schedule any professional or personal activities during the team visit, including evening hours.

Commission staff or the team lead will assign team members to focus on the unit (one or more of the Common Standards) or on educator preparation programs. Team members assigned to review programs may be responsible for reviewing one to three "like" programs (e.g., multiple subject and single subject, or education specialist and related added authorizations, or services programs, etc.). Team members focus on interviews and documents relevant to their assigned standards or programs. Accreditation teams work on a consensus basis, so as the visit progresses team members will share what they are learning about their assignments with the rest of the accreditation team. Team members participate throughout the visit in that collaborative spirit. Team members fulfill their responsibilities by participating in all the following activities:

- Reviewing all evidence provided to the team prior to the visit:
- Participating in all team meetings
- Conducting all scheduled interviews
- Reviewing supporting evidence available
- Writing a report of their findings

III. Roles of Accreditation Team Members

Team Lead

The role of a team lead during an accreditation visit is complex and challenging. The team lead helps team members make full use of their interview and document review time, conducts the pre-visit planning meetings, facilitates the Mid-visit Report meeting and the Summary report presentations, and leads all deliberations and writing tasks of the team. Additionally, the team lead serves as the representative of the Commission and the COA, conducts interviews, and participates in other key activities of the visit. Finally, the team lead, in collaboration with the Commission staff consultant, has responsibility for presenting the full team report to the COA, and ensuring that the COA has accurate and timely information about the review to make its accreditation decision.

Team leads must have a solid understanding of the Commission's Common Standards and the current Commission procedures for accreditation visits. They must also possess strong facilitation skills, the ability to build group consensus, and be able to skillfully handle complex and sometimes difficult decision-making. The overall effectiveness of the accreditation process and the value it has for California institutions depends, in part, on the preparation and professionalism brought by the team lead to this critical task. Additional Information related to the specific roles and tasks for the team lead is included in Chapter Eleven.

Team Members

Team members are assigned to review credential and authorization programs relevant to their knowledge and experience. Team members are charged with the task of reviewing the education unit or its programs and determining the extent to which the institution and its programs are aligned with the Common Standards and appropriate Program Standards. Team members conduct all assigned interviews, review all evidence appropriate to their assignments, familiarize themselves with any additional supporting evidence, and participate fully in all team meetings. They participate in deliberations about the quality of the institution's response to the Common and Program Standards, reach consensus on findings for each standard, and an overall accreditation recommendation to the COA for the institution and all its credential programs. In addition, all team members have report writing responsibilities before and during the visit.

IV. Role of Commission's Consultant

An assigned state consultant works with the institution before the accreditation visit and will begin working with the institution between 9 and 12 months prior to the accreditation visit. This work focuses on the logistics and preparation for the visit. The consultant may also respond to questions from the institution about the meaning and intent of standards, state credential requirements, and various implementation issues. The consultant works closely with the institution on the overall structure of the site visit, the development of the interview schedule, and general logistics to confirm the accreditation review team has what it needs to carry out its responsibilities.

Once the accreditation site visit commences, it is the consultant's job to safeguard the integrity of the accreditation process. The consultant, with the team lead, interact with the institution's accreditation coordinator throughout the entire visit on behalf of all team members. The consultant works to ensure the reviewers conduct their visit under the auspices of the *Accreditation Framework*, and the procedures and protocols established by the COA. The consultant serves to assist the accreditation review team by providing information and assistance to reviewers as necessary. It is critical that the consultant keep lines of communication open between the reviewers and the institution, making sure the institution has every opportunity to provide reviewers with information they need to make informed decisions. The consultant helps the team in its deliberations as well as in editing and reviewing the report.

Finally, the staff consultant, in collaboration with the team lead, has responsibility for introducing the report to the COA, and providing the COA with accurate and timely information about the review to make its accreditation decision.

V. Conflict of Interest, Professional Behavior, and Ethical Guidelines

Conflict of Interest

Individuals will not be assigned as team members to review institutions or programs for which they have a current or had prior official relationship. Such relationships can include, but are not limited to employment, application for employment, enrollment, application for admission, or any of these involving a family member. Moreover, team members have a responsibility to acknowledge any reason that would make it difficult for them to render a fair, impartial, and professional judgment. If a potential team member is uncertain whether a conflict of interest exists, it is that individual's responsibility to alert the state consultant about the relationship so that a determination can be made.

The list of potential team members is sent to the institution prior to the visit. If the institution believes one or more team members may have a conflict of interest, the consultant and the Administrator of Accreditation should be notified as soon as possible. A state consultant will not be assigned to an institution if the consultant has been employed by that institution, applied for employment to that institution, been an enrolled student at the institution, or otherwise had a prior relationship that could have the potential to adversely affect the visit.

Finally, members of the COA are required to recuse themselves from any decisions affecting institutions with which they have potential conflicts of interest.

Professional Behavior
Team members are expected to act professionally at all times. Intemperate language, accusatory questions, hostile behavior, or other actions or deeds that would compromise the professional nature of the accreditation process are not permitted. Any such conduct may lead to a possible disqualification from the Board of Institutional Reviewers (BIR). As representatives of the Commission, team members and the state consultant are expected to always comport themselves with dignity, cordiality, and politeness. Institutions will evaluate the performance and conduct of all team members and the evaluation will be considered in determining whether individuals continue as members of the BIR.

Ethical Guidelines
The COA requires all team members to adhere to the highest standard of ethics while performing any accreditation-related activity. Interviews are held in strict confidence. Team sessions are also confidential, and the information discussed is not shared with non-team members. The presentation of the Summary Report at the Exit Meeting is public and open.

VI. Team Member Preparation for an Accreditation Visit

Being Assigned to a Team
An Administrator of Accreditation or their staff proxy is responsible for assigning individuals to the accreditation site visit teams. BIR members are annually asked to identify dates during which they are available to participate in an accreditation site visit.

Travel Plans
If travel is necessary for the site visit, team members will receive detailed travel instructions from the state consultant. Team members should make travel arrangements upon receipt of the instructions, following the guidelines for arrival and departure.

All travel reimbursements will follow state-adopted guidelines. Any expenses beyond those specified in state regulations will not be reimbursed. If a team member's district or county office employer requires a substitute teacher during the site visit, the Commission will pay for that cost when billed by the district.

Review Materials
The state consultant will be in contact with all team members to ensure they have received all relevant information prior to the visit and respond to any questions team members may have about the visit.

Clothing
Team members should dress in a professional manner while performing accreditation duties in public. Team members should also bring comfortable and casual clothes for evening team meetings.

Telephone Use and Internet Access
Personal and professional phone calls should be kept to a minimum during site visits. Team members must bring their own laptops to the visit. In instances where one is not available, the team member must contact the state consultant in advance to make other arrangements for a Commission issued laptop. For accreditation visits that are held virtually, when permitted, team members are expected to have a reliable internet connection and a workspace that will honor the confidentiality requirements that accompany the accreditation visit.

Special Accommodations
If a team member has allergies, specific lodging needs, dietary restrictions, or requires other special accommodations, that team member should contact the state consultant as soon as possible so appropriate arrangements can be made.

Participation in Team Meetings
Members of the accreditation team are expected to arrange their travel to arrive at the team's hotel in time for all team meetings. Throughout the duration of the visit, team members are expected to travel together, dine together, and be available for all required meetings. Team members should plan to work every evening. Finally, team members must not leave the host campus prior to the presentation of the team's report at the Exit Meeting, without prior arrangement with the state consultant.

For accreditation visits held virtually, team members are expected to participate fully in team meetings and all other aspects of the accreditation visit held via an electronic platform. The remote nature of the accreditation visit does not change the content of the site visit, only the way in which the accreditation team interacts with the constituents of the institution.

Participation in Assigned Interviews
Team members will be assigned to a series of interviews by the team lead. Team members should review the interview schedule and may request adjustments based on that review. Any changes in the schedule must be facilitated by the team lead and the state consultant. The institution being accredited must make a substantial effort to produce the requisite number of interviewees, thus team members must respect that effort by conducting the interviews as scheduled, if possible. Any unusual events or problems regarding the interviews should be discussed with the team lead and the state consultant. For a visit that occurs virtually, the institution will provide links for both the team member and the interviewees to access during the interview time.

<u>Review Appropriate Supporting Documentation</u>
Team members are expected to dedicate time to research issues that are identified in Program Review or Common Standards review or that arise during interviews. Since the accreditation process calls for a recommendation based on a balanced review of all available information, team members should be as familiar with the supporting documentation and evidence as they are with the interview data. All documentation and evidence are the property of the institution and should not be reproduced or transported outside of the context of the site visit.

<u>Participation in Team Deliberations and Report Writing</u>
Accreditation teams are expected to use a consensus model in making decisions. Respecting the viewpoint of all members and focusing the discussion on evidence about the institution and its programs facilitates making a decision that reflects a comprehensive assessment of the evidence. Writing the report is the shared responsibility of the entire team. The team lead will assign writing tasks which may begin as early as the team member begins to review evidence. It is every team member's responsibility to remain engaged in the process until the report is finished or the team lead and Commission consultant indicate that members have fulfilled their responsibilities associated with the site visit.

VII. Collecting and Analyzing Data

The accreditation team will review a variety of data including interview data from the site visit, documents and evidence supplied by the institution, and the Accreditation Data Dashboard. Team members may not collect data from other sources or use anecdotal information collected outside of the accreditation visit process. All team members are required to keep a record of interviews conducted, materials reviewed, and the findings that result from the process. All information from the interviews is considered private and confidential. Any quotes used by the team will be reported anonymously and any data will be reported in the aggregate to ensure constituent confidentiality. All team member notes taken during the interviews or during document reviews are the property of the COA and are collected by the state consultant at the end of the accreditation visit. These materials will be retained by the consultant for one calendar year after the visit. Similarly, all electronic exhibits will remain the property of the institution.

To conduct interviews with an adequate number of individuals representing each group, institutions may find the use of technology (e.g., phone, video conferencing), is necessary.

<u>Reading and Analyzing Documents</u>
The Program Review process, which is described in more detail in Chapter Six, occurs in the fifth year of the accreditation cycle. During Program Review, trained BIR members read and analyze all program documents submitted by the institution. The outcome of a Program Review is a *Preliminary Report of Findings.* Team members assigned to review a particular program must be familiar with the results of the Program Review process and have a responsibility to follow up on issues or questions identified during Program Review. The *Preliminary Report of Findings* is made available to the team on the institution's accreditation website.

Team members receive access to the institution's accreditation website sixty days prior to the accreditation visit. The website will have an addendum posted for any and all Common Standards and Program Standards not found preliminarily aligned during the Common Standards review or Program Review process. Each addendum is thoroughly read and reviewed by site visit team members prior to the visit. Being prepared is critical as team members work to collect information pertinent to any questions and concerns. Additionally, preparation prior to the accreditation visit provides team members more time during the site visit to focus on interviews and additional evidence provided at the time of the visit.

Develop Initial Questions
Team members carefully read the evidence submitted on the institution's accreditation website, making notations where they have questions or concerns or require clarification. Team members should begin to write interview questions based on the evidence appropriate to their assignments. The *Preliminary Report of Findings* from Program Review or Common Standards review identifies any areas of concern which suggest interview questions or documents to review at the accreditation visit.

Interview Techniques
A critical method of obtaining sufficient data to make a determination of institutional and program quality and effectiveness is interviewing individuals with direct knowledge of the institution and/or programs. Sufficient numbers of individuals from all the major constituencies related to the institution or program must be interviewed carefully about their experiences with the institution and its programs. BIR training prepares accreditation team members for gathering information during the interview process at accreditation visits. BIR members focus their questions on the specific types of information that would be known by the various constituencies. For instance, program faculty would have greater understanding of the program design and various pathways offered by the institution than the candidates. Candidates would have insight on how effectively they are receiving essential information about program requirements, while mentors would have valuable information about how they were trained and oriented to their roles. Various techniques are practiced during BIR trainings to most effectively gather the critical information from various constituencies. Additionally, BIR training discusses techniques to use for phone interviews, group interviews, and other types of interviews.

VIII. Making Decisions about Standards

The complex process of making sense of the data and arriving at defensible decisions about each standard involves completing interviews, examining all available documents and evidence, reviewing data, and analyzing as much additional relevant information as possible. The overall determination and recommendation of the team is included in the final team report, which is written after the team has come to a finding on all standards. The team will discuss each standard and make a consensus determination using one of three available categories: Met, Met with Concerns, or Not Met. It is critical that the team's assessment relies exclusively on evidence accumulated in preparation for and during the accreditation visit as indicated in this *Accreditation Handbook*. The fact that the team has evidence from several different constituencies (e.g., candidates, faculty, supervising teachers, employers, completers, data, and documents) and sources (assessment data, survey data, program documentation, and so forth) is important in making the final decision.

While the COA has developed statements about what constitutes a Standard as Met, Met with Concerns, and Not Met; it is the professional judgment of the accreditation team members that determine in which category the collected data best fits.

Standards Findings
For each standard the team will make one of three decisions:

> **Standard Met:** The overwhelming majority of all phrases of the standard are evident and effectively implemented.
>
> **Standard Met with Concerns**: One or more phrases of the standard are not evident or are ineffectively implemented.
>
> **Standard Not Met:** Significant phrases of the standard are not evident or are so ineffectively implemented that it is not possible to see the standard implemented in the program.

In all cases where a standard is Met with Concerns or Not Met, the team will provide a specific rationale for the finding that is grounded in the language of the standard. The rationale should include either what part of the standard was not confirmed by the accreditation team (what was missing) or the information it reviewed that confirmed that the standard was not being implemented.

IX. Writing the Team Report

The report will be written with the purpose of informing the COA about the extent to which an institution and its educator preparation programs satisfy applicable standards and to support the COA in rendering an accreditation decision. Findings will be supported by evidence collected by the team. The report will contain specific comments about the team's assessment of the educational unit and each program's quality, strengths, and deficiencies. The team lead and consultant will edit the final draft of all report sections for clarity, coherence, and uniformity.

Chapter Eight provides guidance regarding how to determine whether the standards findings suggest an overall recommendation for *Accreditation*, *Accreditation with Stipulations*, *Accreditation with Major Stipulations*, *Accreditation with Probationary Stipulations, or Denial of Accreditation*.

X. Concluding the Visit

When the draft summary report is finished and ready for presentation, team members have completed their responsibilities associated with the accreditation visit. Prior to leaving the institution (in-person or virtually, as permitted), team members must give peer-edited drafts of their complete reports to the consultant. The state consultant will collect interview notes and any other documentation generated during the accreditation visit. If possible, expense forms should be completed and left with the consultant. The expense form allows the state to reimburse the team members for specified out-of-pocket expenses associated with the accreditation visit. Shortly after the visit, team members will be contacted to complete an evaluation as part of the accreditation system's on-going improvement process described in Chapter Thirteen.

Concluding Activities and Team Report

The presentation of the summary report is typically held during the late morning or early afternoon of the last day of the accreditation visit. This report is a summary of all findings regarding preconditions, program standards, and Common Standards. It lists which standards were Met, Met with Concerns, or Not Met, as well as the rationale for each standard less than fully met. The summary report will also include the team's overall accreditation recommendation to the COA and draft language for stipulations the institution must address within one year or less of the visit/COA action. The summary report is first presented by the team lead and state consultant to the institution's unit lead and appropriate directors in a closed session. The accreditation team holds a public presentation of the report after the closed session. The format of this meeting is an oral presentation of the summary report by the team lead. Typically, the team lead reports the findings and discusses the rationale for the accreditation recommendation. On occasion, the team lead may invite comments from team members. This is not a time for the institution to debate the recommendation or submit new data. A copy of the report is left with the institution lead.

The state consultant and team lead compile all team members' reports into one comprehensive Accreditation Site Visit Report. The team lead and state consultant work together to develop a comprehensive report with all the required parts. Shortly after the visit, the team lead and the state consultant send the draft report to the to the institution which has one to two weeks, depending on the proximity to the COA meeting where the report will be presented, to review for accuracy and to correct errors of fact. It is the institution's responsibility to notify the state consultant of needed changes. The report will be posted on the Commission's website as part of the next regularly scheduled COA agenda. The final copy of the report, as it will appear when presented to the COA for its review and final decision, is sent to the institution and team lead prior to the date of the COA meeting.

Evaluation of Accreditation Process and Personnel

The Commission provides everyone associated with an accreditation visit an opportunity to evaluate all aspects of the visit, ranging from the initial contact through the report presentation, including an evaluation of all team members. The evaluation instrument is designed to gather data for improving the accreditation process. This data is used to identify areas for improvement in the process and areas where team members may need additional support.

To assist in the quality of the BIR, the institution may provide feedback about each member of the accreditation team. Team members also evaluate each other and are asked to identify future team leads as well as those who had challenges in their role as team member. This data is considered by Administrators of Accreditation when decisions are made regarding retention of individuals on the BIR and identification of individuals able to assume leadership roles in future visits. If the institution has concerns about the performance of the state consultant, the Administrators of Accreditation or Director of the Professional Services Division should be contacted.